



District Executive (Informal)

Thursday 7th October 2021

9.30 am

**Virtual Meeting
using Zoom meeting software**

The following members are requested to attend the meeting:

Jason Baker
Mike Best
John Clark
Adam Dance
Sarah Dyke

Peter Gubbins
Henry Hobhouse
Val Keitch
Tony Lock
Peter Seib

Any members of the public wishing to address the meeting at Public Question Time need to email democracy@southsomerset.gov.uk by 9.00am on Wednesday 6th October 2021.

The meeting will be viewable online at:

https://www.youtube.com/channel/UCSDst3IHGj9WoGnwJGF_soA

For further information on the items to be discussed, please contact democracy@southsomerset.gov.uk

This Agenda was issued on Wednesday 29 September 2021.

Jane Portman, *Chief Executive*

**This information is also available on our website
www.southsomerset.gov.uk and via the Modern.gov app**

Information for the Public

In light of the coronavirus pandemic (COVID-19), District Executive will meet virtually via video-conferencing to consider reports. As of 7 May 2021 some interim arrangements are in place for committee meetings.

At the meeting of Full Council on 15 April 2021 it was agreed to make the following changes to the Council's Constitution:

- a) To continue to enable members to hold remote, virtual meetings using available technology;
- b) To amend Part 3 (Responsibility for Functions) of the Council's Constitution to allow those remote meetings to function as consultative bodies and delegate decisions, including Executive and Quasi-Judicial decisions, that would have been taken by those meetings if the Local Authorities and Police and Crime Panels (Coronavirus) (Flexibility of Local Authority and Police and Crime Panel Meetings) (England and Wales) Regulations 2020 had continued in force to the Chief Executive (or the relevant Director in the Chief Executive's absence) in consultation with those meetings and those members to whom the decision would otherwise have been delegated under Part 3 of the Constitution;
- c) The delegated authority given under (b) will expire on 31 July 2021 unless continued by a future decision of this Council;

For full details and to view the report please see -

<https://modgov.southsomerset.gov.uk/ieListDocuments.aspx?CId=137&MId=2981&Ver=4>

Further to the above, at the meeting of Full Council on 8 July 2021, it was agreed to extend the arrangements for a further 6 months to 8 January 2022.

For full details and to view the report please see -

<https://modgov.southsomerset.gov.uk/ieListDocuments.aspx?CId=137&MId=3033&Ver=4>

District Executive

Meetings of the District Executive are usually held monthly, at 9.30am, on the first Thursday of the month (unless advised otherwise).

The District Executive co-ordinates the policy objectives of the Council and gives the Area Committees strategic direction. It carries out all of the local authority's functions which are not the responsibility of any other part of the Council. It delegates some of its responsibilities to Area Committees, officers and individual portfolio holders within limits set by the Council's Constitution. When major decisions are to be discussed or made, these are published in the Executive Forward Plan in so far as they can be anticipated.

Members of the Public are able to:-

- attend meetings of the Council and its committees such as Area Committees, District Executive, except where, for example, personal or confidential matters are being discussed;
- speak at Area Committees, District Executive and Council meetings;
- see reports and background papers, and any record of decisions made by the Council and Executive;
- find out, from the Executive Forward Plan, what major decisions are to be decided by the District Executive.

The Executive Forward Plan and copies of executive reports and decisions are published on the Council's web site: <http://modgov.southsomerset.gov.uk/ieDocHome.aspx?bcr=1>

Agendas and minutes can also be viewed via the mod.gov app (free) available for iPads and Android devices. Search for 'Modern.gov' in the app store for your device, install, and select 'South Somerset' from the list of publishers, then select the committees of interest. A wi-fi signal will be required for a very short time to download an agenda but once downloaded, documents will be viewable offline.

Public participation at meetings (held via Zoom)

Public question time

We recognise that these are challenging times but we still value the public's contribution to our virtual meetings. If you would like to participate and contribute in the meeting, please join on-line through Zoom at: <https://zoom.us/join> You will need an internet connection to do this.

Please email democracy@southsomerset.gov.uk for the details to join the meeting.

If you would like to view the meeting without participating, please see: https://www.youtube.com/channel/UCSDst3IHGj9WoGnwJGF_soA

The period allowed for participation in Public Question Time shall not exceed 15 minutes except with the consent of the Chairman and members of the Committee. Each individual speaker shall be restricted to a total of three minutes.

If you would like to address the meeting at Public Question Time, please email democracy@southsomerset.gov.uk by 9.00am on Wednesday 6th October 2021. When you have registered, the Chairman will invite you to speak at the appropriate time during the virtual meeting.

Virtual meeting etiquette:

- Consider joining the meeting early to ensure your technology is working correctly.
- Please note that we will mute all public attendees to minimise background noise. If you have registered to speak during the virtual meeting, the Chairman will un-mute your microphone at the appropriate time.
- Each individual speaker shall be restricted to a total of three minutes.
- When speaking, keep your points clear and concise.
- Please speak clearly – the Councillors are interested in your comments.

District Executive (Informal)

Thursday 7 October 2021

Agenda

1. Minutes of Previous Meeting

To approve as a correct record the minutes of the informal District Executive meeting held on Thursday 2nd September 2021.

2. Apologies for Absence

3. Declarations of Interest

In accordance with the Council's current Code of Conduct (as amended 26 February 2015), which includes all the provisions relating to Disclosable Pecuniary Interests (DPI), personal and prejudicial interests, Members are asked to declare any DPI and also any personal interests (and whether or not such personal interests are also "prejudicial") in relation to any matter on the Agenda for this meeting.

Members are reminded that they need to declare the fact that they are also a member of a County, Town or Parish Council as a Personal Interest. Where you are also a member of Somerset County Council and/or a Town or Parish Council within South Somerset you must declare a prejudicial interest in any business on the agenda where there is a financial benefit or gain or advantage to Somerset County Council and/or a Town or Parish Council which would be at the cost or to the financial disadvantage of South Somerset District Council.

4. Public Question Time

5. Chairman's Announcements

Items for Discussion

6. South Somerset Families Project - Budget Approval (Pages 6 - 15)

7. Future Chard Strategy (Pages 16 - 110)

8. Procurement Strategic Framework and Revised Standing Orders (Pages 111 - 206)

9. Medium Term Financial Plan (MTFP) Refresh 2021/22 - 2023/24 (Pages 207 - 229)

10. Establishment of a Joint Committee in Somerset for the implementation of local government reorganisation (Pages 230 - 238)

11. Public Space Protection Orders: Yeovil (Pages 239 - 245)

12. District Executive Forward Plan (Pages 246 - 250)

13. Date of Next Meeting (Page 251)

14. Exclusion of Press and Public (Page 252)

15. Briefing on Local Government Reorganisation (Confidential) (Page 253)

South Somerset Families Project – Budget Approval

Executive Portfolio Holder:	Cllr Mike Best, Health & Wellbeing
Strategic Director:	Kirsty Larkins, Director Service Delivery
Service Manager:	Leigh Rampton, Lead Specialist - Communities
Lead Officer:	Alice Knight, Specialist, Housing
Contact Details:	leigh.rampton@southsomerset.gov.uk

Purpose of the Report

1. The purpose of this report is to update members on ~~the~~ progress and seek budget approval for the 2021/22 financial year to continue the delivery of the South Somerset Families' Project.

Forward Plan

2. This report appeared on the District Executive Forward Plan for October 2021

Public Interest

3. This priority project aims to support struggling families and help address child poverty and low rates of social mobility in the district over the 3 years 2020-23. The project is playing a key role in light of the additional pressures on families resulting from the Covid-19 pandemic, and strong outcomes are being delivered.

Recommendations

4. That District Executive recommends that the Chief Executive agrees to:-
 - a) Note the continued growth in the delivery and initial outcomes of the South Somerset Families Project across the district.
 - b) Increase the revenue budget by £303,000 to fund the South Somerset Families Project for this financial year (2021/22).
 - c) To fund this expenditure by using earmarked revenue reserves using its delegation given in section 4 of the Constitution – as set out in Section 13 of this report.
 - d) Note that a decision to continue funding this project in the 2022/23 financial year will be considered later in the year by District Executive and Council as part of the overall MTFP and budget setting process.

Background

5. In the approved Council Plan 2020 – 2024 and Annual Action Plan 2021/22 one of the key areas of focus was to enable healthy & self-reliant communities, which are cohesive,



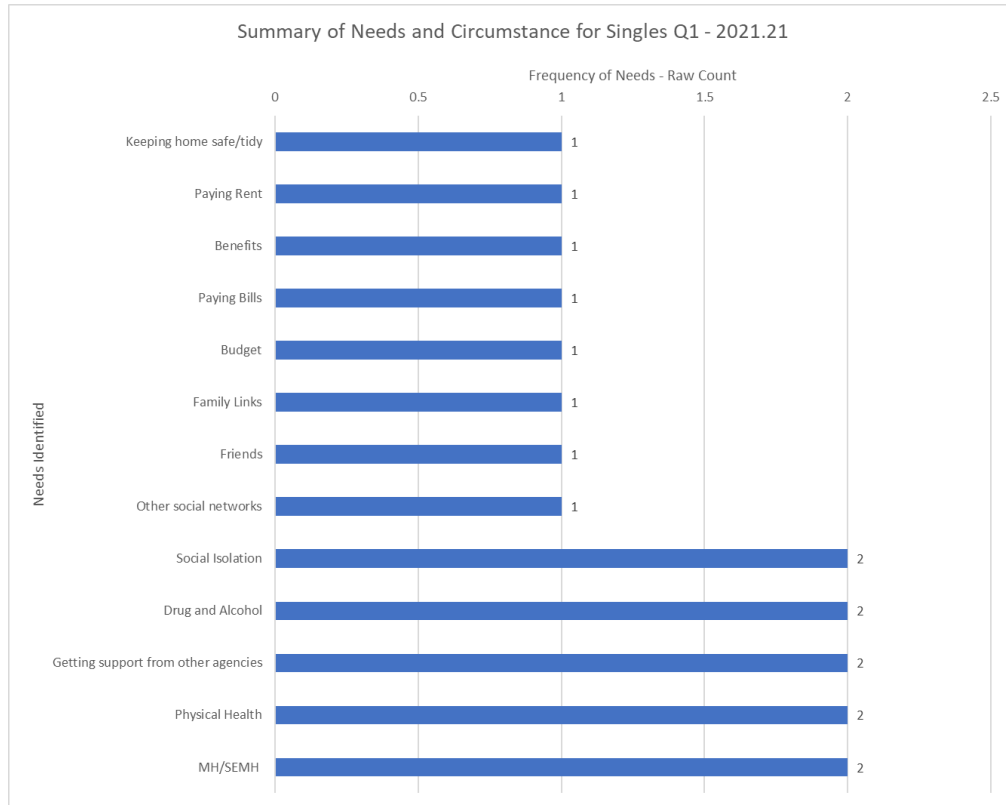
South Somerset District Council

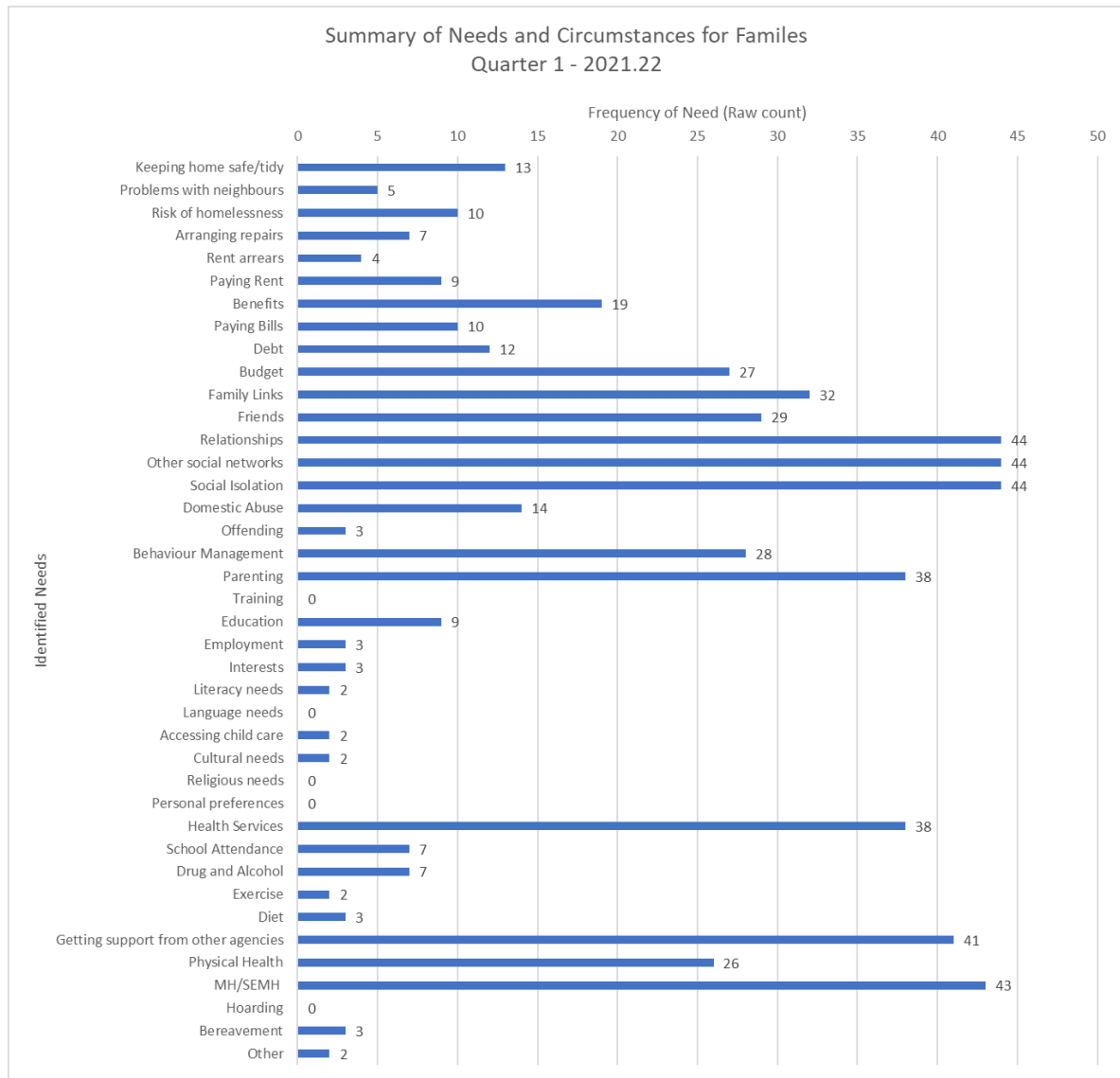
sustainable and enjoy a high quality of life. The key action identified was to “develop proposals to support struggling families and help address child poverty and low rates of social mobility in the district.” This priority project was seen in the Council Plan as central to addressing some of the long-standing barriers and challenges facing local families that affect attainment, social mobility and wellbeing

Project Evaluation

6. Appendix A sets out the formative evaluation review for the 2020/21, which proved to be a challenging year. Despite substantial practical challenges (i.e. school closure and increased NHS demand) of the pandemic the project has scaled up and full delivery has been achieved.
7. 203 cases have been accepted since project commencement and 60 families have completed the programme (there is a 4% drop-out rate). There are currently 143 families (484 individuals) receiving support and a waiting list of 29 families.
8. There have been 56 referrals alone in the last quarter and the timing of the project and its scaling has been fortuitous as it is playing a crucial role in supporting local families facing acute challenges because of the Covid-19 pandemic.
9. The figures in appendix A clearly the value of the project and the positive impact it is having on families and singles in some of the most deprived areas of the district.
10. As at 30th June 2021, SSFP were supporting 153 cases, of which 136 were families and 17 were singles. 56 referrals have been received from April-June 2021. The summary of needs and circumstances at point of referral are shown in Table 1 and Table 2 below

Table 1





Financial Implications

11. On the 4th June 2020, District Executive agreed to fund the project £361k for 2020/21 from the Community Initiative Reserves. It also agreed that future budgets of £303k per annum for each of the following two years of the project would be sought from Members after consideration of the initial project outcomes.
12. It is proposed to increase the Council's overall revenue budget for this financial year by £303,000. This expenditure would be funded by using revenue earmarked reserves as follows: £213,000 from the Community Initiatives Reserve and £90,000 from the community resilience fund (established to assist communities with Covid recovery).
13. Under Section 4 of the Constitution, District Executive can utilise Council balances (capital and revenue) in responding to matters of urgency or to deliver the agreed policy framework provided that all uses of balances are reported to full Council in the Budget and Medium Term Financial Plan report and Audit Committee in the Annual Outturn



South Somerset District Council

report subject to a limit of 5% of useable reserves/balances. This expenditure, and the proposed means of funding it, meets the delegated authority as:

- The expenditure proposed will help meet one of the key areas of focus in the approved Council Plan 2020 – 2024 namely to enable healthy & self-reliant communities which are cohesive, sustainable and enjoy a high quality of life.
- The S151 Officer confirms that the expenditure sought is less than 5% of revenue reserves although she asks Members to note that the use of these reserves for this purpose would use all of the remaining balances in both reserves in this financial year.

14. Members are also asked to note that because of the commitments and to ensure the project continues without any gaps a payment of £50k was made in advance of this report. The decision was taken in agreement with the Leader, Portfolio Holder, Section 151 Officer and Director of Service Delivery and use delegations to the Director set out in Financial Procedure Rules section 2.3 (i).

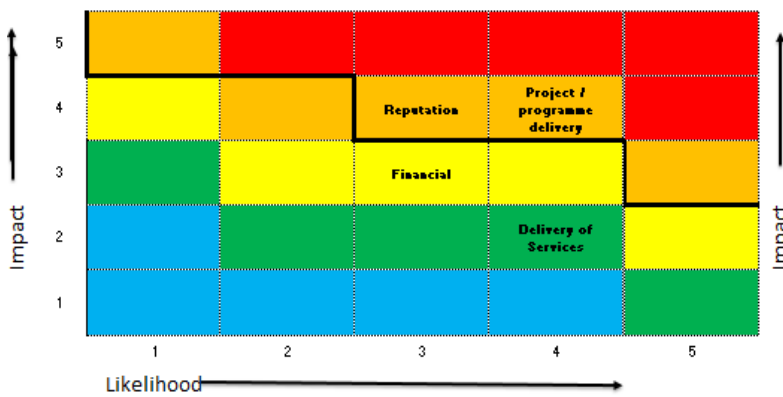
15. A decision as to whether to fund this project for the financial year 2022/23 will be dealt with as part of the normal MTFP and budget setting process with the request for funding being part of the budget growth proposals.

Legal implications (if any) and details of Statutory Powers

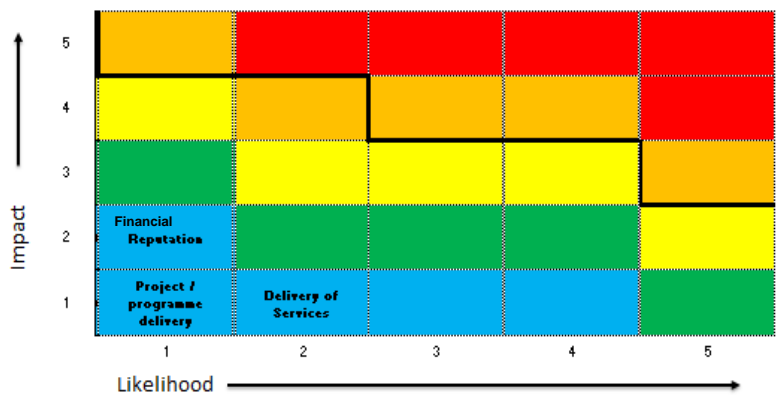
16. None at the current time.

Risk Matrix

INHERENT RISK RATING (Before application of Report Recommendations)



RESIDUAL RISK RATING (After application of Report Recommendations)



Risk Ref	Risk Category	Inherent Risk Rating	Residual Risk Rating
1	Project / programme delivery	20	1
2	Financial	14	1
3	Delivery of Services	10	3
4	Staffing & Capacity	0	0
5	Reputation	19	2
6	Health & Safety	0	0
7	Governance & Legal	0	0

Risk Description	Mediation / Controls
project will cease if funding stops	allocation of funding is confirmed
risk of project not being delivered successfully	robust project monitoring by SSDC to ensure funds used appropriately
increase demand on SSDC services without the project	partnership looking to ensure customer receives support required
0	0
high profile priority project fails	SSDC committing full support to the project
0	0
0	0

This project falls under the Healthy, Self-Reliant Communities area in the Council Plan. Specifically it meets the earlier Priority Project 7: Develop proposals to support struggling families and help address child poverty and low rates of social mobility in the district and is now part of the revised Priority Project 4 in the 2021/22 annual action plan.

Carbon Emissions and Climate Change Implications

Few implications – but a localised delivery of services reduces the need to travel to access services.

Equality and Diversity Implications

The project has increased the support available for the most vulnerable in our community, providing them with support workers and mentors to improve their quality of life and that of their family.

Privacy Impact Assessment

Privacy considerations are covered in the Service Level Agreement.

Background Papers

- I. Formative Evaluation Overview
- II. Y4F Annual Impact Report

Appendix A - Formative Evaluation Report

The evaluation below sets out the performance of the South Somerset Families Project (SSFP) for 2020/21. The SSFP provides one-to-one tailored support offered by Outreach Link Workers and Volunteer Mentors to support the client and show them there is a chance that life can be different both now and for generations to come.

The project aim is to provide support across South Somerset to struggling families to help them to be in a better position to help themselves. The target outcomes for the three years of the project are:

- Creation of a more stable environment within families
- Improved mental and physical health
- Increased attendance and educational attainment of children
- Decreased engagement of families with public services
- Reduce the number of children living in poverty
- Improve the chances that a person born into disadvantage will do well in school and get a well-paid job
- Improve the quality of life for struggling families
- To reduce the number of families reaching the point of struggling 18.

In the long term, subject to the project's success and continuation beyond the first three years, the target outcomes are:

- Reduced rates of child poverty
- Increased rates of social mobility
- Improved educational attainment of children from poorer families – closing the gap on those from non-poor backgrounds
- Higher skill levels amongst South Somerset's young people that had better match the needs of local employers and the modern economy
- Contribution towards reducing deprivation in South Somerset and a reduction in the number of neighbourhoods in the top 20% most deprived nationally

SSFP works with all types of families and individuals whether there are children and young people, cared for by one or two adults regardless of faith, identity, race, disability, marital status, social class, age or sexual preference

The highlights from the first year are:-

- Dedicated teams of link-workers are now in post and operating in the more disadvantaged areas of Chard, Wincanton and Yeovil East (Westfield and Birchfield). These teams are working with local partners such as schools, health visitors, primary health care and community organisations to identify and work with families at risk of entering into a period of crisis.
- The biggest drivers of need identified during recent delivery have been parental mental health, loss of control, social isolation, child mental health, school attendance and debt.
- Referrals are received from local agencies and such is the demand that there is now a waiting list.
- Targeted pieces of additional work are being developed to respond to particular issues that have emerged in recent months. This includes:-

- new provision for teens in families facing challenges (including links with Yeovil Rugby Club)
- post-Covid nature-based wellbeing work
- Targeted pilot work in Crewkerne to improve wellbeing, as approx. 40% of those currently on the waiting list live in Crewkerne.

Project Outcomes

In 2020/21, South Somerset Families program (SSFP) received 145 requests for support (121 families and 24 individuals). Referrals came from a diverse group of professionals as outlined in the table below:

Table 1 Referral Sources to SSFP year ending 31st March 2021

Referral Source	Families	Singles	Total
School	49	1	50
Family Intervention Service	22	2	24
Abri	5	6	11
CSC	9	1	10
Health Visitor	10		10
Surgery	5		5
Counseling4Yeovil		4	4
MIND		4	4
Balsam Centre	2		2
Church	1	1	2
Citizens Advice	2		2
Holly Court	2		2
Police	1	1	2
Somerset Drug and Alcohol Service	1	1	2
Y4F Outreach Community Fieldworker	1	1	2
Bournemouth Charitable Housing Association	1		1
CAMHS	1		1
Community Council for Somerset	1		1
Education Safeguarding (EWO)	1		1
EHA Hub	1		1
Escapeline	1		1
Homeless/Community Fieldworker	1		1
Housing - Stonewater	1		1
Self-referral	1		1
Second-Step		1	1
South Somerset District Council		1	1
Yeovil District Hospital	1		1
Youth Group	1		1

Of the 121 family clients supported this year:-

- 49% indicate feeling improved mental health and wellbeing.

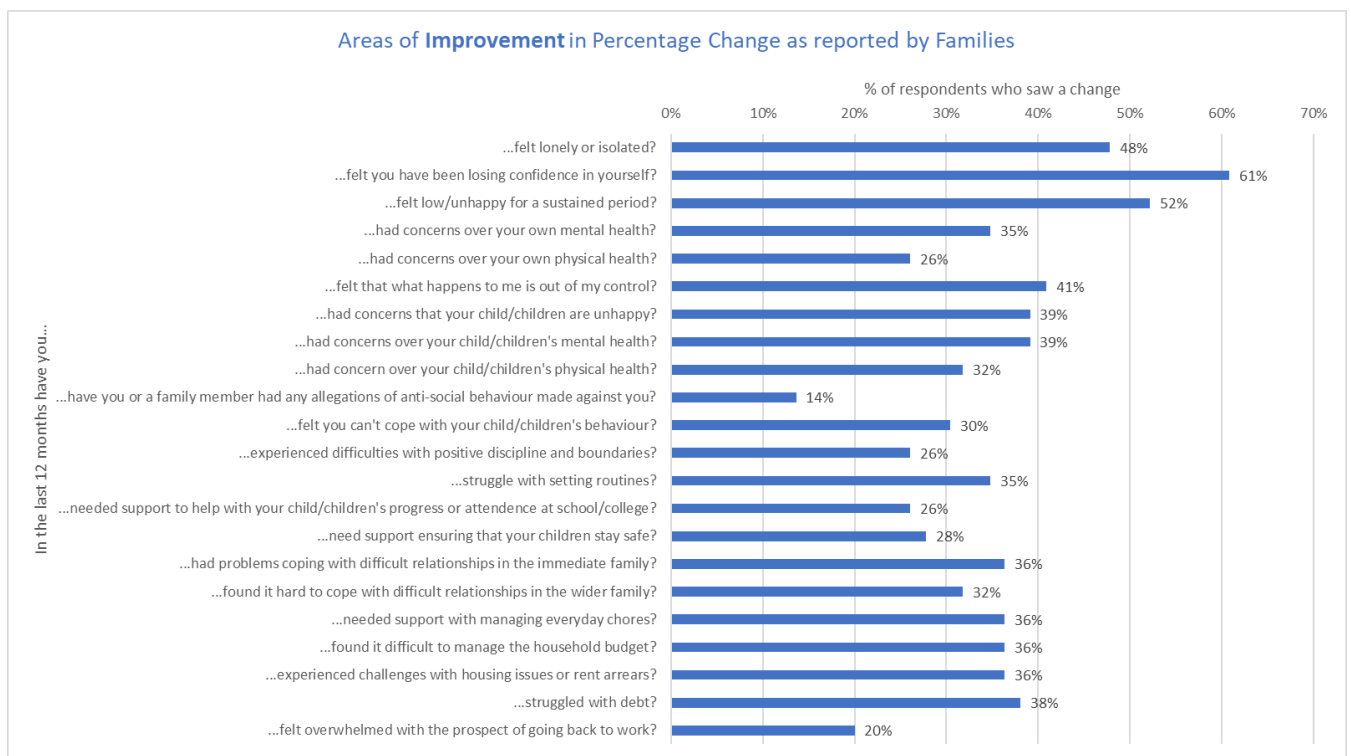
- Aggregated family reports show 61% stated that they have seen a positive change in their confidence levels
- 48% showing reduced feelings of isolation
- 52% reporting improved mood.
- 39% of families indicate that they have noticed improvement in their children’s mental health and wellbeing too.

These figures are incredibly positive, bearing in mind the challenging year with the COVID-19 pandemic has presented for many in terms of mental health.

Many families, on joining the project report struggling with their children’s behaviour. Link workers can support parents with establishing routines and boundaries for their children. 30% of all families reported improvement in this area.

37% of all families supported throughout their year with SSFP reported improvement with housing issues, rent arrears, managing a budget and debt. Of note is the 41% improvement observed in feelings of regaining a sense of control over family lives

Table 2 Outcomes Data for Families 2020/21 – Areas of Improvement



Of the 24 singles supported by the project-

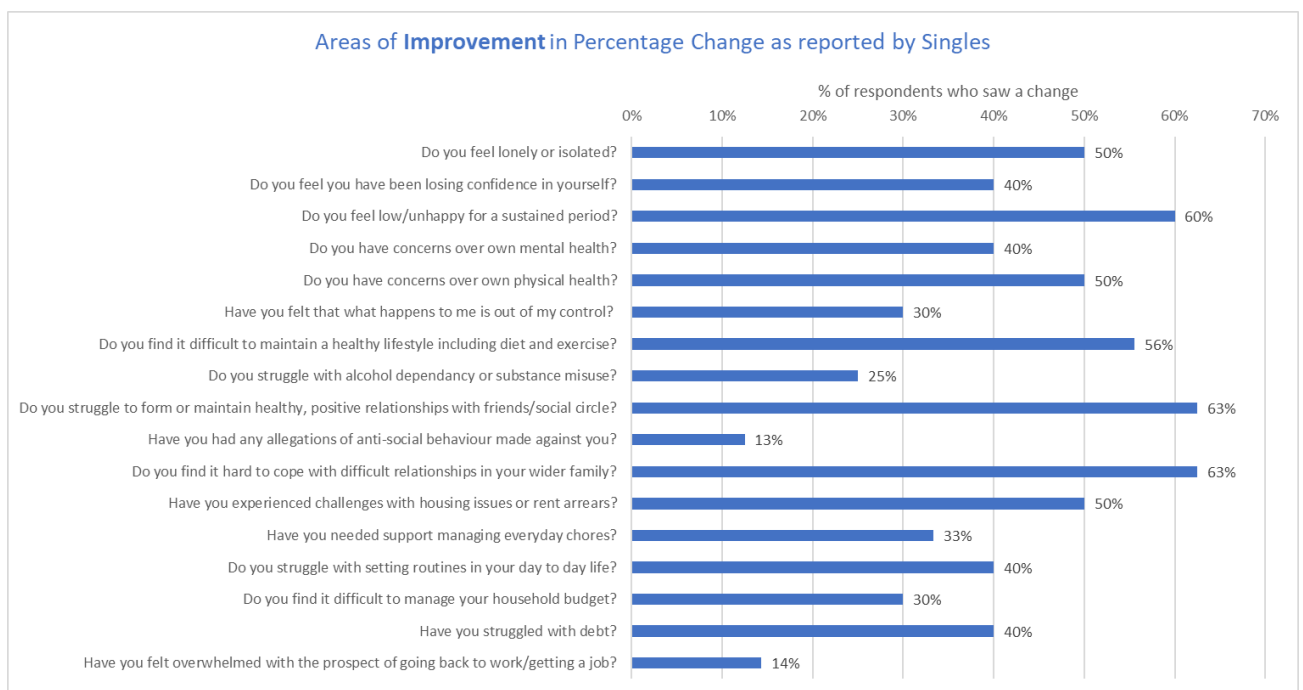
- 48% reported an overall improvement in their mental health
- 60% reported there has been significant improvement in low mood with
- 50% said they feel less lonely and isolated.

On exiting the project 63% of all respondents report improved feelings around maintaining positive, healthy relationships within their family and wider social networks. Connection to others is an important protective factor for resilience and the ability to cope with many life challenges.

56% of singles indicate they have observed a change in their concerns over their physical health and their ability to maintain a healthy lifestyle. Anti-social behaviour and substance misuse, including alcohol dependency, can be recurring problems particularly for some of our single clients. 25% report improvement in management of this area of their lives.

43% of all singles supported throughout their year with SSFP reported improvement with housing issues, rent arrears, managing a budget and debt.

Table 3 Outcomes Data for Singles 2020/21 – Areas of Improvement



Summary

The key outcomes achieved as reported by program participants in exit assessments include:

- 83% of parents reported an improvement in control
- 75% an improvement in their mental health.
- 82% of parents reported an improvement in child mental health
- 27% an improvement in school attendance.
- 67% of parents reported an improvement in managing the household budget
- 50% an improvement in coping with debt.
- 42% reported a reduction in their social isolation and loneliness.

Future Chard Strategy

Executive Portfolio Holder:	Cllr Jason Baker, Area West Portfolio Holder
Strategic Director:	Jan Gamon, Director of Place & Recovery
Lead Officer:	Anna Matthews, Chard HSHAZ Project Manager
Contact Details:	anna.matthews@southsomerset.gov.uk or 01935 468958

Purpose of the Report

1. The purpose of the report is to provide District Executive with a draft of the Future Chard Strategy and to seek approval to progress to public consultation.

Forward Plan

2. This report appeared on the District Executive Forward Plan with an original anticipated Committee date of 2 September 2021. It was moved forward to the October 2021 meeting on the recommendation of the Strategic Leadership Team.

Public Interest

3. The draft Future Chard Strategy considers Chard's needs from the perspective of both people and place. It looks at the town's strengths and weaknesses, and the future opportunities and threats. The draft strategy proposes a long-term vision, priorities and action plan that aim to make Chard a prosperous place for all in the future.

Recommendations

4. That District Executive recommends that the Chief Executive:
 - a. offers feedback on the vision and priorities identified within the strategy
 - b. approves the draft Future Chard Strategy to progress to public consultation

Background

5. PER Consulting was appointed by South Somerset District Council to develop a new place-based strategy for Chard 2021-2035, to drive the town's long-term prosperity.
6. There are a number of significant challenges for residents of Chard. This includes urban deprivation, with several areas falling within the 20% most deprived nationally for education and skills, as well as concerns around income deprivation for example. There is poor social mobility, linked to low skills and income opportunity.
7. There is also a lower number of working people than is typical for Somerset and, where someone is employed, this is more likely to be in a low wage job. The economy is particularly vulnerable to closures, as seen in the announcement from Oscar Mayer



South Somerset

District Council

regarding closure of its manufacturing plant in Chard, with the loss of more than 800 jobs, representing 15% of jobs in the town.

- This place-based strategy seeks to address these challenges and tests a new way of working in the area. If successful, it could be rolled out to other towns. The draft strategy sets out a long-term vision for Chard and the steps needed to reach it. Although Local Government Reorganisation (which was decided during the development of this strategy) means that SSDC will not be the main delivery agency, it will remain highly relevant to the new unitary authority, who will have the opportunity to take the lead.

Future Chard Strategy

- The PER Consulting team was commissioned to draft a long-term strategy that responds to the interplay of economic factors, the physical and natural environment, infrastructure delivery, deprivation and the wider determinants of health – considering both people and place and the halo effect of positive impact in one area on another.
- PER Consulting has been supported by the SSDC Place & Recovery officer team to draw together an evidence base of data, engage in one-to-one and group conversations with key stakeholders in Chard, conduct a community survey and visit the town to meet with local people and get a sense of its physical geography.



- This research has provided an understanding of Chard’s needs, from its current strengths and weaknesses to its future opportunities and threats. The insight drawn from this complete picture has led to the proposed long-term vision, priorities and action plan for the short, medium and long term set out in the draft Future Chard Strategy appended to this paper.
- District Executive is asked to provide comments on this draft strategy and then – following any update required in response – to allow this draft strategy to progress to public consultation. This would be conducted during the autumn via in-person events (covid-19 permitting).
- Following this consultation, it is proposed that the updated draft Future Chard Strategy is brought back to District Executive, prior to being taken to Full Council for adoption.
- The proposed timetable is as follows:

Public consultation period	8 th October to 7 th November 2021
Updates, amendments, papers prepared, etc.	8 th to 12 th November 2021
Updated Strategy to Senior Leadership Team	22 nd November 2021
Updated Strategy to Scrutiny	30 th November 2021
Updated Strategy to District Executive	2 nd December 2021



Financial Implications

15. There are no direct financial implications arising from this report. However, once the final strategy is adopted, should SSDC wish to begin delivery prior to Local Government Reorganisation, consideration will need to be given to funding its delivery, through the Council's financial planning processes.
16. The strategy will also put SSDC and/or the new unitary authority in a strong position to apply for future strategic funds, attracting new resources into the area.

Legal implications (if any) and details of Statutory Powers

17. None arising from this report.

Risk Matrix

18. Not applicable to this report.

Council Plan Implications

19. This strategy supports our ambitions for regeneration and improved economic prosperity within South Somerset, consistent with our stated areas of focus and priority projects.

Carbon Emissions and Climate Change Implications

20. None arising from this report, although we would expect future activities to be consistent with our stated ambitions around net zero by 2030

Equality and Diversity Implications

21. None arising from this report.

Privacy Impact Assessment

22. There is no personal data associated with this report.

Background Papers

- Draft Future Chard Strategy
- Appendix 1 – Draft Future Chard Strategy Action Plan
- Appendix 2 – Social & Economic Baseline Report



**South Somerset
District Council**

13 September 2021

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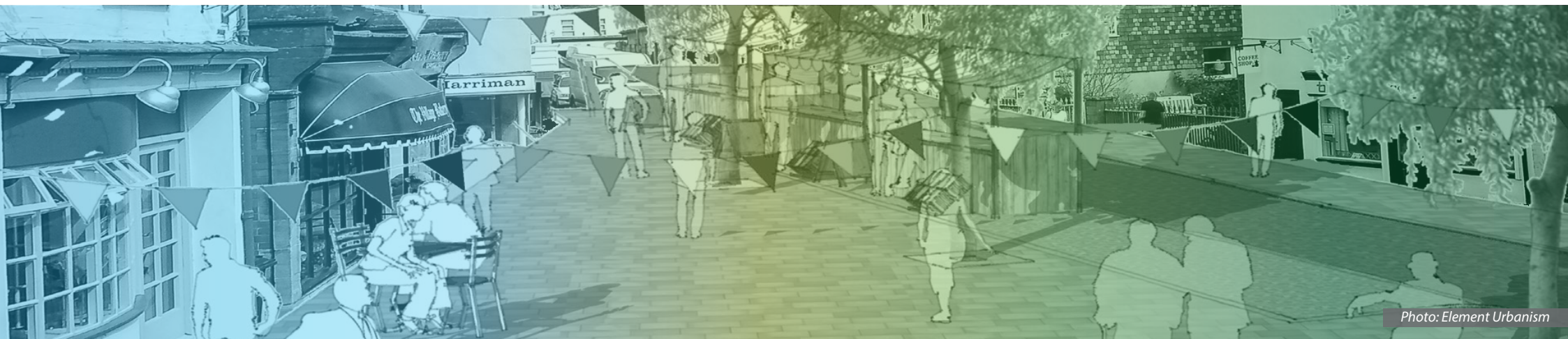
Future Chard Strategy 2021 -2035

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Introduction

Chard is an historic industrial and market town, situated within the beautiful hills and rolling countryside of South Somerset. It is one of four primary market towns serving the South Somerset area together with Crewkerne, Ilminster and Wincanton as well as the principal settlement of Yeovil; just 17 miles to the east. Chard is the second largest settlement in the district comprising around 8% of both the total population and district wide employment base, as shown below.

Page 2

Table 1: South Somerset Settlement Hierarchy

Location	Population (2011)	%	Employment (2019)	%
Yeovil	45,800	28.4	30,500	46.9
Chard	13,100	8.1	5,300	8.2
Crewkerne	7,800	4.8	3,100	4.8
Ilminster	5,800	3.6	2,500	3.9
Wincanton	5,400	3.3	2,600	4.0
South Somerset	161,200	100	65,000	100

Source: ONS Population Census (2011),
Business Register Employment Survey (2019)

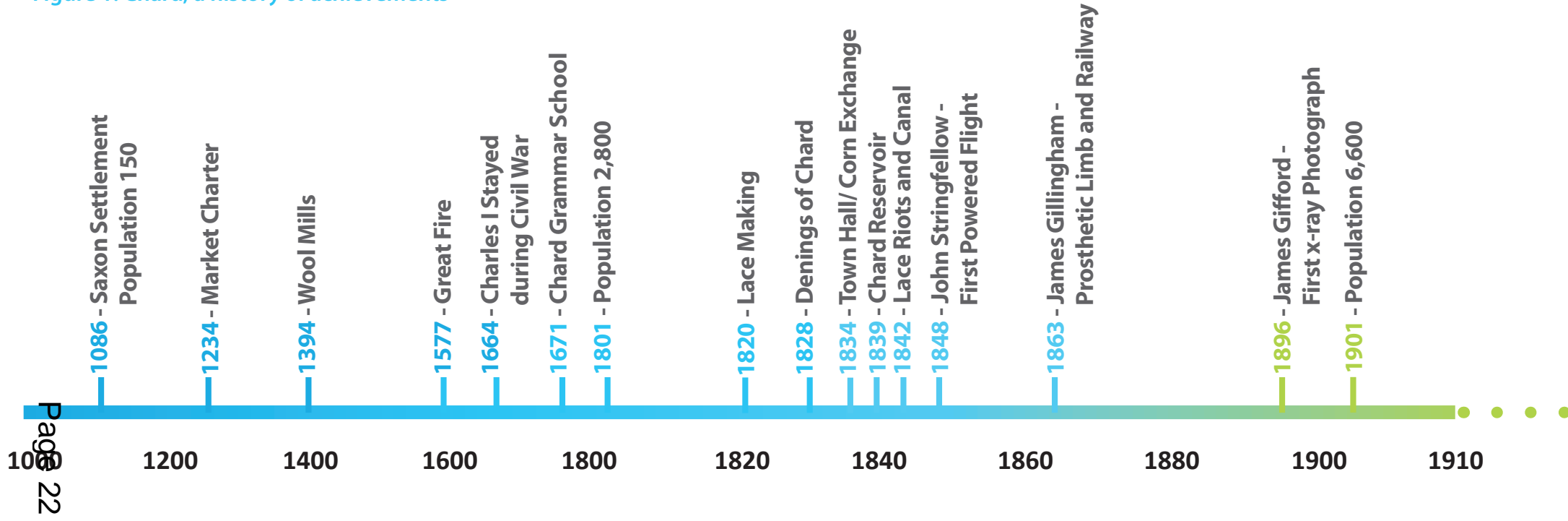


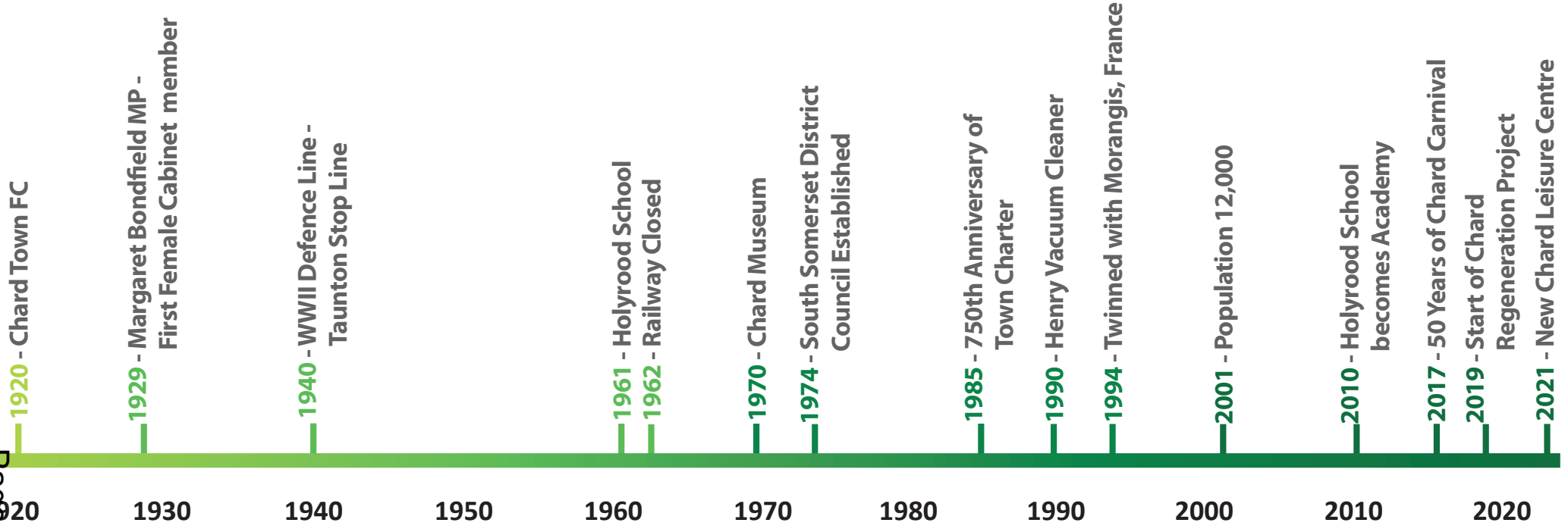
The town is well connected to the regional road network with the A30 and A358 both running through it, connecting on to the A303 and the M5 at J25 near Taunton within 25-minute drive. Chard is just 7 miles from the main line rail stations at either Crewkerne or Axminster over the Devon border.

Chard is designated a Strategic Growth Area in the adopted South Somerset Local Plan (March 2015), providing around 12% of the total district housing needs to 2028 and provision for around 10% of forecast employment. This compares with Yeovil's expected growth accommodating around 46% of the total housing allocation and nearly 50% of future employment.

The plan proposals are designed to sustain Chard's role as a balanced place to both live and work and reflect the town's long history as an important centre of manufacturing and industrial innovation. From its market charter in 1234, Chard was known for its Wool Mills and then lace making and later iron foundry and engineering. Since 1990, Chard has been home to world renowned Henry vacuum cleaner manufacturer, Numatic International.

Figure 1: Chard; a history of achievements

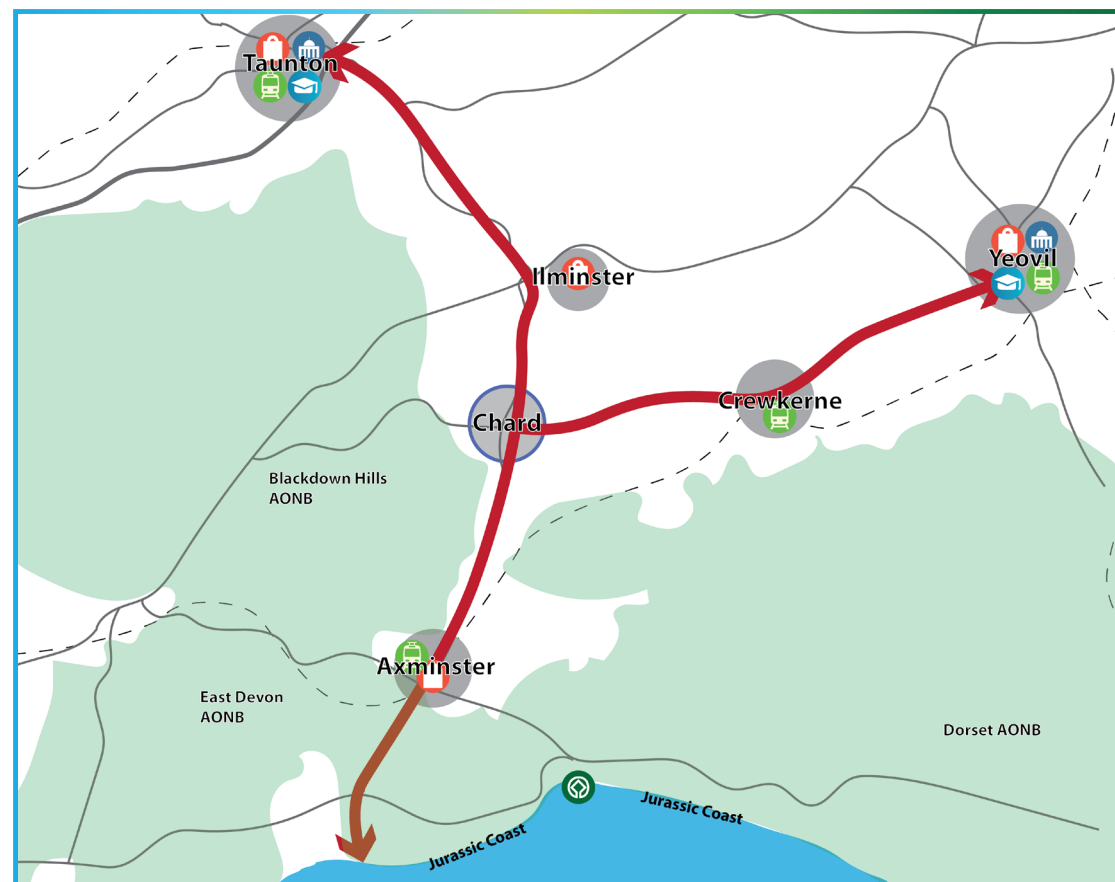




The physical regeneration and growth of Chard has been guided over the past decade by the Chard Regeneration Plan (LDA Design September 2010). This has framed the critical priorities for the town centre improvements, delivery of new housing growth and sports and leisure provision. Work continues to see improvement to local transport movement and economic growth.

Whilst Chard has benefitted from strong levels of employment within the town, reducing the need to travel, most employment is relatively low skilled and of low pay. There are significant challenges of urban deprivation with several areas within Chard falling within the 20% most deprived nationally for education and skills, as well as concerns around income deprivation both due to age dependency on state pensions and low-income families. These are the challenges this Strategy seeks to tackle.

Figure 2: Chard Strategic Location



Source: based on Ordnance Survey data under SSDC Licence agreement

Purpose of Strategy

Whilst there is considerable investment underway in the physical infrastructure and growth of Chard there is also a need to take a step back and take a wider, holistic, view of the future e for Chard – the place and the community. That is the purpose of this document, the Future Chard Strategy takes a long-term view from 2021 to 2035 and sets out a clear pathway for social, economic and community well-being, consistent with the overarching Council Plan and Vision for South Somerset.

The desired changes for Chard identified in this strategy are not necessarily easy nor in the control of any one organisation or community group. Success will demand concerted effort and collaboration, as well as continued community engagement. A range of actions are identified to tackle the challenges facing the people, the economy and the environment of Chard which are designed to build local capacity and drive change. Further actions will continue to be developed, gathering momentum as the Strategy evolves to meet the long-term ambition and vision for the Future of Chard.

“ Council Plan 2020 – 2024

Our Vision for South Somerset:

A naturally beautiful and sustainable environment, which also allows business to flourish and good homes to be delivered. A place where our communities are safe, vibrant and healthy and have access to exceptional cultural and leisure activities.

- South Somerset District Council



Photo: Arup



Photo: Chris Jones Regeneration



Photo: Microsoft

Vision for Chard

Our ambition is for Chard to realise its true potential as a strong community and economic service centre.

The Vision for Chard is:

“

A better connected and dynamic place, focused on the town centre as a destination hub for community life and with a clear identity for being able to “Make it in Chard”, a feature of both the diverse local economy and an aspiration for personal achievement

”

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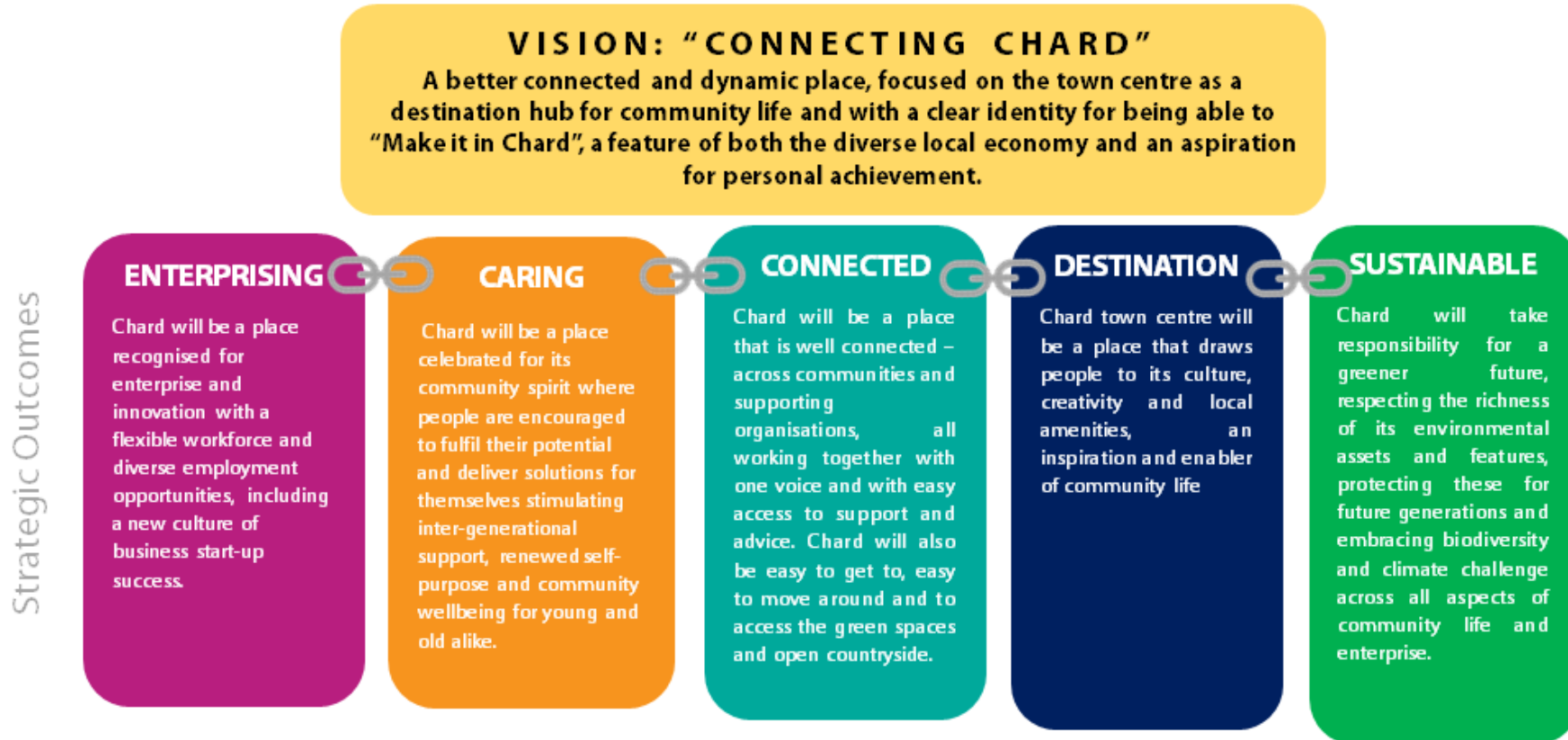


Photo: Element Urbanism



Photo: AHR Architects

Figure 3: Chard Vision and Strategic Outcomes



This vision is based on the challenges identified in Chard from research and community engagement and an understanding of the underlying potential and future opportunities for change.

The outcomes which will support the vision are set out overleaf and in the diagram below.

The issues for Chard today and what can be done to tackle them are developed further in the rest of this document.



Chard Desired Outcomes - 2035

The key outcomes we want to achieve for Chard as a result of this Strategy are set out below:

ENTERPRISING: Chard will be a place recognised for enterprise and innovation with a flexible workforce and diverse employment opportunities, including a new culture of business start-up success.

CARING: Chard will be a place celebrated for its community spirit where people are encouraged to fulfil their potential and deliver solutions for themselves stimulating inter-generational support, renewed self-purpose and community wellbeing for all ages.

CONNECTED: Chard will be a place that is well connected – across communities and supporting organisations, all working together with one voice and with easy access to support and advice. Chard will also be easy to get to, easy to move around and to access the green spaces and open countryside.

DESTINATION: Chard town centre will be a place that draws people to its culture, creativity and local amenities, an inspiration and enabler of community life.

SUSTAINABLE: Chard will take responsibility for a greener future, respecting the richness of its environmental assets and features, protecting these for future generations and embracing biodiversity and climate challenge across all aspects of community life and enterprise.

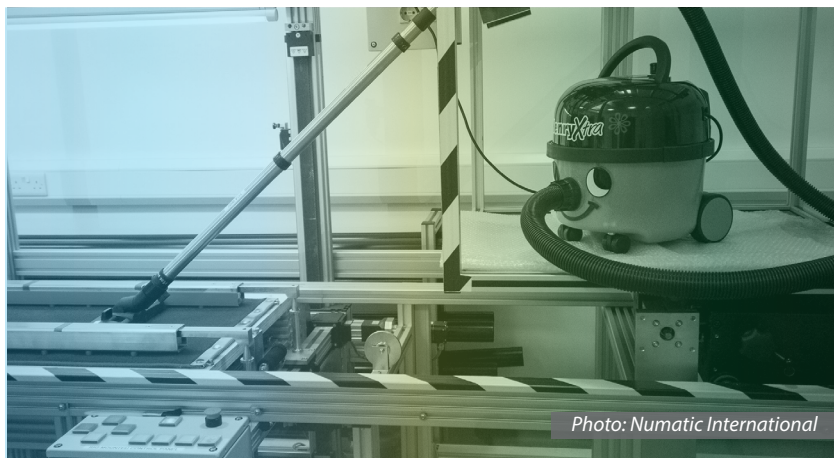
Understanding Chard

Chard demonstrates all the hallmarks of an industrial town albeit set within the stunning Somerset countryside. Whilst its origins draw from the land as an historic market town it quickly evolved as a manufacturing centre, first in the woollen mills and then in lace production (before Nottinghamshire excelled) and latterly in engineering and food processing. Manufacturing success has encouraged population growth and migration to Chard, now with strong local Polish and Portuguese communities alongside the wider Somerset heritage and traditions. Although some residents keep to themselves, there is no sense of alienation but rather a strong cohesive local community spirit characterises the people of Chard.

The dominance of the strong manufacturing presence in the town has provided generations of near full employment with Chard remaining largely self-contained as an employment centre with very little need for people to look outside the area for work. This can, however, in turn limit expectations for better employment prospects, with a presumption of readily available but low paid work perpetuating low educational attainment limiting local aspiration for change and constraining social mobility.

Recently, unemployment in Chard has been rising, exacerbated by the Covid-19 global pandemic and further compromised with the announcement of closure of Oscar Mayer food processing plant.

The combined effect of recent events put a different perspective on the previously self-contained identity of Chard and the distribution of services covering an increasingly wider region. Indeed, the close spatial connectivity between different centres across Somerset would ordinarily support a strong hierarchy of service provision with Chard expected to easily connect with larger centres.

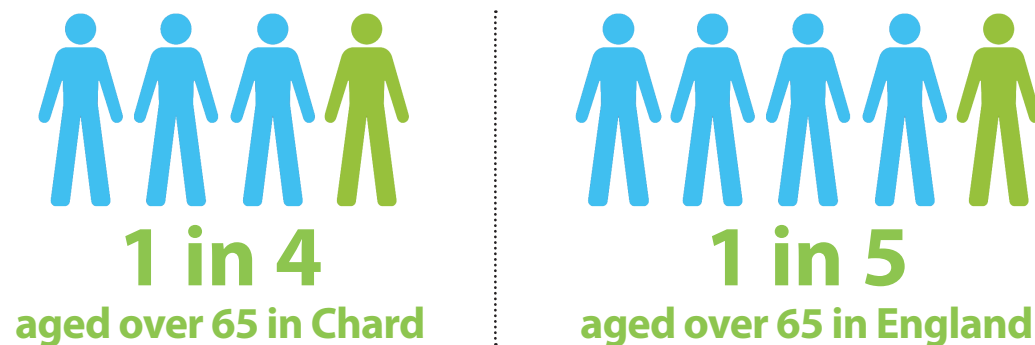


This works for those with access to private cars but disconnects with those in greatest need and reliant on public transport which has eroded over the years throughout rural communities as public subsidies are curtailed.

Further details of the socio-economic context of Chard and the findings from the community survey and local conversations are set out in the accompanying technical appendix. The key findings from the research are summarised below:

High proportion of residents over retirement age

There were around 13,900 residents living in Chard in 2019, a +3% increase (+300 residents) in the last five years.



Chard also has higher rates of all age groups above 50 years compared to England signaling continued ageing of the population.

High proportion of residents over retirement age

Although data is only available at the local authority level, there is a higher proportion of residents across South Somerset (8%) with no qualifications compared with 6% nationally and a much lower proportion with level 4 qualifications (degree level and above), 26% in South Somerset compared with 25% across Somerset and 43% for England overall. This reflects other evidence available at the Chard level, such as a high proportion of employment in sectors that do not require level 4 qualifications (such as manufacturing, hospitality and retail) and areas of Chard falling in the top 20% most deprived for education and skills.

Low levels of income

Average household incomes in Chard are around £26,200, lower than the average for South Somerset (£30,300), South West Region (£27,500) and England (£31,600). Furthermore, low income is a particular issue in the west of Jocelyn ward near the town centre, north of Hollyrood ward near the town centre, and in the ward of Combe. Low incomes reflect the sector mix in Chard, with a high proportion of lower paid jobs such as manufacturing, retail and hospitality. It also demonstrates a lack of opportunity for residents to access higher paid jobs, for social mobility and improving prosperity.

High dependence on manufacturing sector

Manufacturing is the largest sector in Chard, with an estimated 2,150 jobs in 2019 (the latest period available) and there is a concentration in just a small number of employers. This accounts for 43% of all local jobs, nearly 6 times higher than the proportion of jobs in England.

Employment was declining pre-covid

Employment in Chard was declining in the years before the COVID pandemic and prior to the announced closure of the Oscar Mayer plant. In 2019 (the latest available date), there was a total of around 5,025 people employed in Chard, a decline of -825 jobs (-14%) compared to 2014. This is despite +3% growth in employment in South Somerset overall and across the Heart of the South West LEP area, and +5% in England over the same period.

Age-related and income deprivation concentrated around central Chard

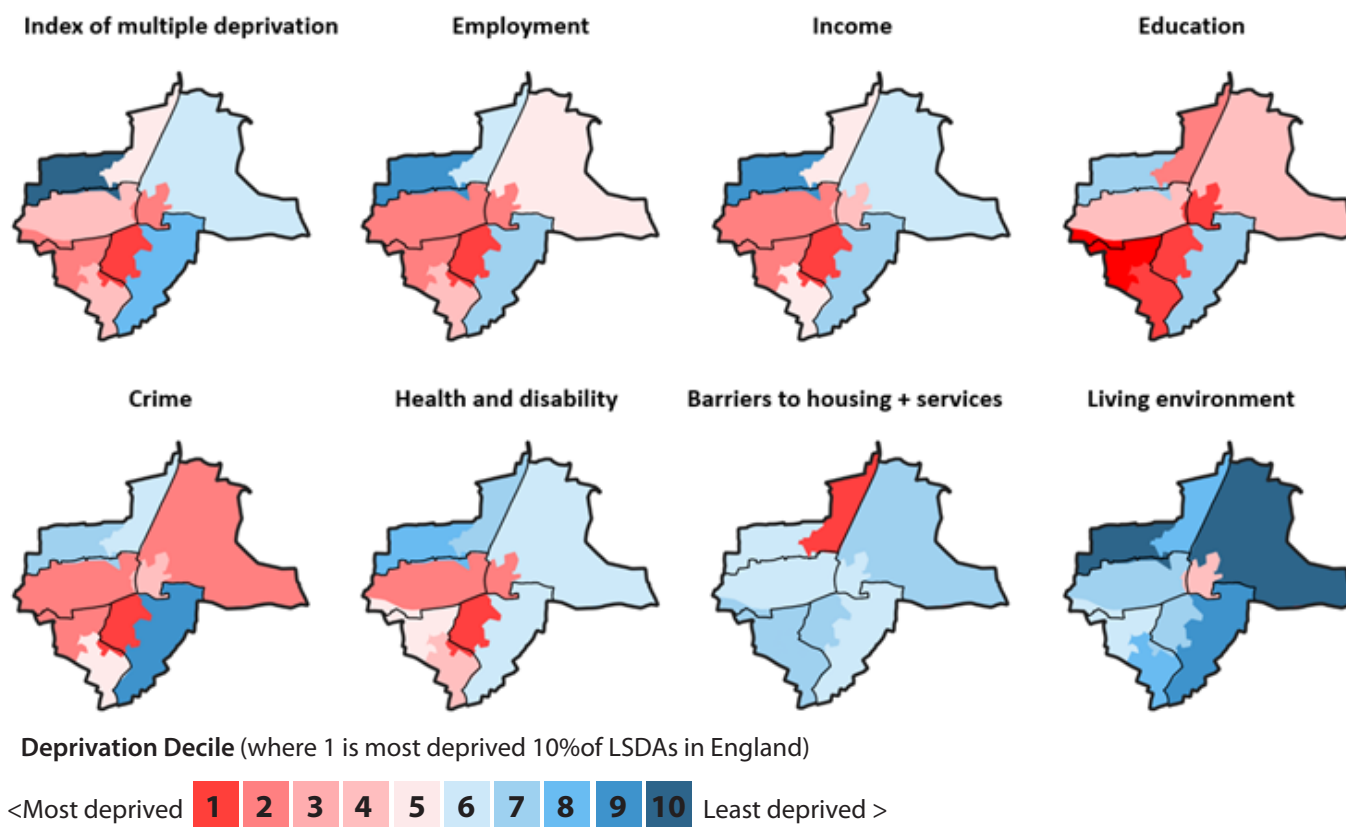
The prosperity and life opportunities of residents living in Chard is unequal, with large differences in deprivation scores found across the town. The maps alongside show the different domains of deprivation by small geographical areas (Lower Super Output Areas), as provided by the ONS.

The indices of multiple deprivation cannot be aggregated to the local ward levels, but the maps below have been presented with the ward boundaries for easy comparison. The key issues arising from the deprivation indices are:

- The town centre area, west of the Jocelyn Ward, falls within the top 20% most deprived across all domains, excluding barriers to housing and services and the living environment.
- The west area of the Holyrood Ward falls within the top 10% most deprived for education, skills and training deprivation, whilst the east area falls within the top 20% most deprived, reflecting low skills attainment and lack of opportunities.

- The northeast area of the Crimchard Ward falls within the top 10% most deprived for barriers to housing and services, reflecting issues relating to affordability and homelessness.
- Employment, education/skills and crime challenges are the greatest issues across the whole town area when compared to other deprivation indicators.

Figure 4: Chard: Indices of Deprivation 2019



Deprivation Decile (where 1 is most deprived 10% of LSDAs in England)

<Most deprived 1 2 3 4 5 6 7 8 9 10 Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019.

Chard Town Centre... community service focus

The core town centre is relatively compact and focused around Fore Street and Holyrood Street. The town centre vacancy rate has increased closer to the national average at the start of 2021 (12.4%) although new investment is taking place with the recent arrival of Home Bargains. The town currently retains three banks or buildings societies which are often at risk following national trends.

Comparison shopping still dominates the town centre offer at around 30% of all units, although lower than the national average of 39% and with fewer national operators and a more limited range than larger, destination, town centres.

Chard provides a much higher level of retail services (hairdressers, opticians etc) occupying nearly 21% of all town centre units compared to 12% on average across the UK, reflecting the strong community-oriented role of Chard town centre.

Town centre food shopping is slightly lower than the national average provision and includes a Sainsbury's supermarket off Bath Street as well as a number of specialist (Polish) food outlets, local butchers and bakeries. Further food shopping is available outside the town centre with a large Tesco store and Lidl serving the wider Chard area.

The food and drink and social scene – including nightlife - lacks depth and sometimes quality with an opportunity for an enterprising culture to fill gaps in the market and potential to re-enforce its rural setting and connection with food and farming.



For reference purposes. Not to scale.

Table 2: Chard Town Centre Ground Floor uses

Use	Chard		UK
	Number	%	%
Convenience (Food)	10	7.3	8.0
Comparison Shopping	41	29.9	39.0
Retail Service	27	19.7	12.0
Retail Leisure	23	16.8	18.0
Business	19	13.9	10.0
Vacant	17	12.4	13.0
Total	137	100	100

Source: SSDC Retail Monitoring (January/February 2021)

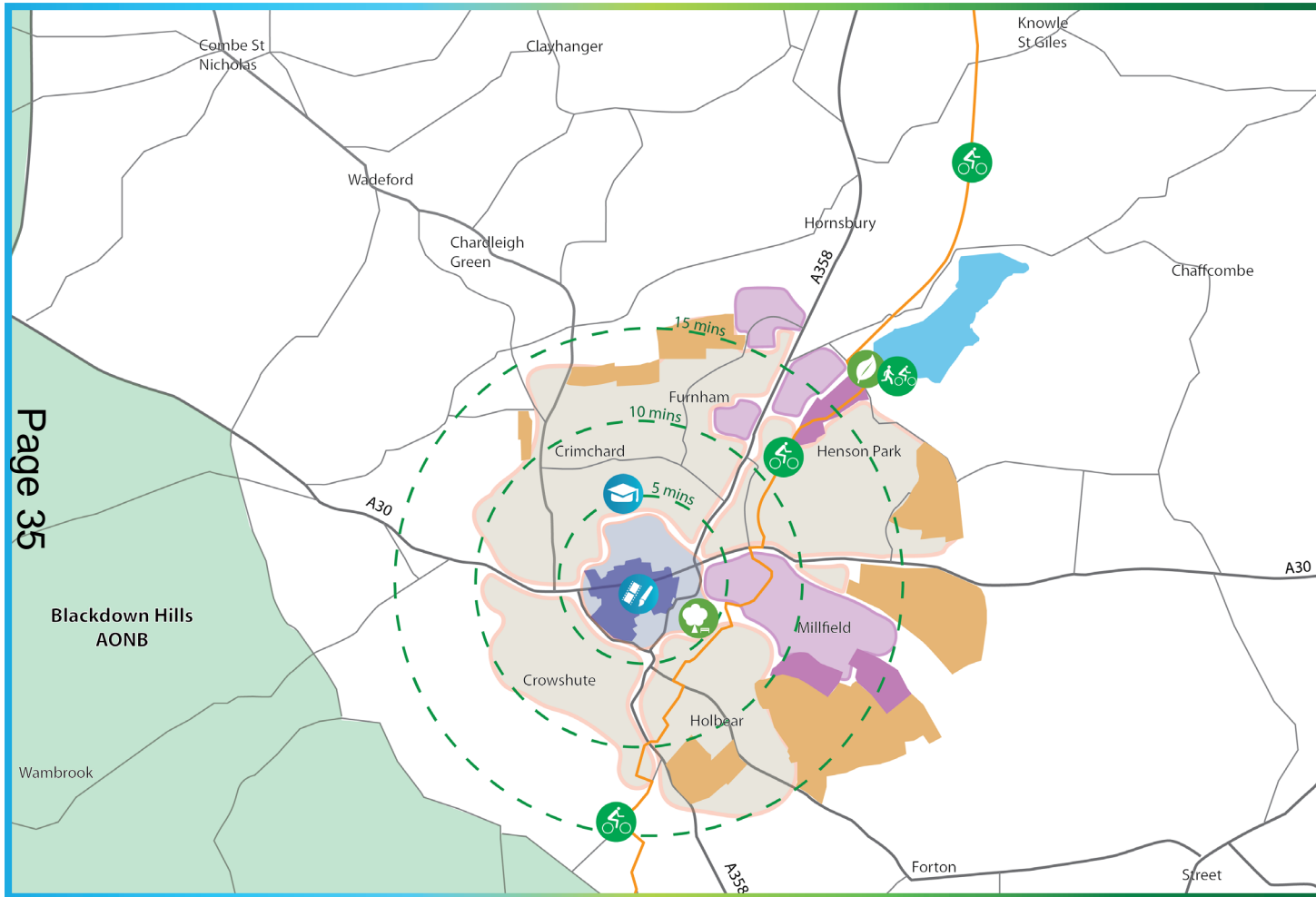
Reflecting on Chard's Potential

The table further on highlight the strengths, weaknesses, opportunities, and threats that will shape the future potential of Chard over the next fifteen years and more.

It is vital for Chard to address the issues of low income and low skills which is constraining social mobility, expectations, and aspirations for the future across much of the community but especially younger people.



Figure 5: Chard: Key Features & Assets



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Chard must use its key strengths in terms of its strategic location, exceptional community spirit and fabulous green spaces to capture economic investment and growth whilst capitalising on the potential of the town centre arising from the regeneration and public realm improvements, including development of the new Chard Leisure Centre.

The compact nature of Chard means most of the town is technically within a 20-minute walk catchment, although the practicality of some routes and improved safety measures may still be required.

Source: based on Ordnance Survey data under SSDC Licence agreement



People

Strengths

- Many diverse and active community groups committed to Chard.
- Blend of people born in Chard and those that have chosen to live here.
- Known for invention such as the birthplace of powered flight, artificial limbs development and the home of Henry vacuum cleaners.
- Sense of pride and satisfaction from local people and strong community cohesion.

Weaknesses

- Higher proportion of older age residents constrains the labour market capacity.
- Lower than average earnings with employment concentrated in manufacturing, retail, and hospitality sectors.
- Unemployment has doubled since the start of the Covid-19 pandemic.
- Employment, education & skills, and problems with crime are the greatest deprivation issues across Chard Work .
- Communication and integration between local organisations and community groups could be constraining local potential.
- Lack of adult learning provision in the town.



Place

- The town is compact and mostly walkable.
- Town centre's Fore Street has some notable civic buildings set within a strong.
- Conservation Area.
- There is a variety of green areas such as parks, amenity areas, sports, recreation and nature reserves and paths/trails which are all well-loved.
- Housing is affordable and a draw to new residents.
- Clear signs of local investment will boost confidence with the completion of the new leisure centre, the library and active and ambitious museum.

- Lack of cohesive arts or cultural scene.
- Further Education/Higher Education provision is not locally accessible.
- Poor public transport provision tends to isolate people when expected to access public services further afield such as Taunton or Yeovil.
- Concerns over traffic congestion in the town centre.
- Night-time economy is very limited.
- No local business representation to stimulate networking and sharing ideas or nurturing a dynamic business spirit.



People

Opportunities

- An active older population can also stimulate strong social capital through local volunteering and community support.
 - SSDC can provide stronger place-based community leadership working with Chard Connect Forum and supporting a stronger community role for the Town Council.
 - Opportunity to explore integrated service delivery through place-based community solutions.
 - Economic growth potential with further expansion of Numatic International to help counter short-term impact of Oscar Mayer closure.
 - Opportunity to create a culture of local ambition and “can-do” mentality through visible role models, celebrating local achievements and making business start-ups a realistic and accessible prospect.
-
- Potential to build on Chard’s environmental and location assets situated between the Blackdown Hills AONB and the Coast.
 - Town positioning – need to develop brand and story that respects its history and develops a positive future to stimulate a stronger destination and diversity of local offer.
 - The new Chard Leisure Centre has the potential to generate a significant stimulus and excitement for the town centre with more linked activity and interaction.
 - The High Street Heritage Action Zone (HSHAZ) with more than £2m investment in town centre buildings and public streets/space will reinforce the town centre linkages and enhance the sense of place.
 - Potential to maximise the visitor appeal of the Stop Line and promote Chard as a service destination along this long-distance coast-to-coast walking and cycling route.



Place

Threats

- Loss of major employer – Oscar Mayer with over half of the town’s manufacturing base disappearing. Proactive engagement underway to support those losing their jobs and encourage positive development solutions for the town centre site.
 - Continued risk of low ambition and aspiration may constrain future potential.
 - Apparent history of over-consultation and concerns about actions not being delivered. Need continuous communication as strategies and solutions evolve whilst managing local expectations and funding constraints.
 - Worries over new housing not matching local infrastructure and facilities development. Need to re-engage on Chard’s growth story demonstrating confidence in delivery and cohesive community development.
 - Concerns emerging around the lack of local focus on Chard following establishment of unitary authority. Formal adoption of this strategy to support the long-term future of Chard will provide the platform for successor bodies and maintain the local community voice.
-
- Narrow employment base with a high dependence on manufacturing sector.
 - Perception of green space and rural setting being eroded by housing development.
 - Risk of future traffic growth not being managed effectively.

Ambition for Chard

This Strategy sets out an ambitious future for Chard and lays the foundations for future prosperity and wellbeing.

Realisation of the Vision and Strategic Outcomes for Chard will be driven by local actions for change. There are four priority themes for intervention, wrapped around the central priority of forging a stronger community identity for Chard, all of which also embrace new ways of collaborative working as illustrated in the diagram opposite and described overleaf. Each priority theme also reflects the overarching challenge of climate change, providing an integrated response to realise a long-term sustainable outcome for Chard.

Crosscutting Theme 1: Make it in Chard – New Identity

Crosscutting Theme 2: New Way of Working

Priority Theme 3: Economy

Priority Theme 4: Community, Health & Wellbeing

Priority Theme 5: Town Centre Destination

Priority Theme 6: Housing & Connectivity

The priority themes respond to Chard's key challenges and opportunities identified from the data research and endorsed by the local community and stakeholder consultation.

The key actions, which local partners can deliver, are highlighted alongside each intervention theme below.

The links between the intervention themes and the Vision outcomes are also illustrated at the end of each theme.

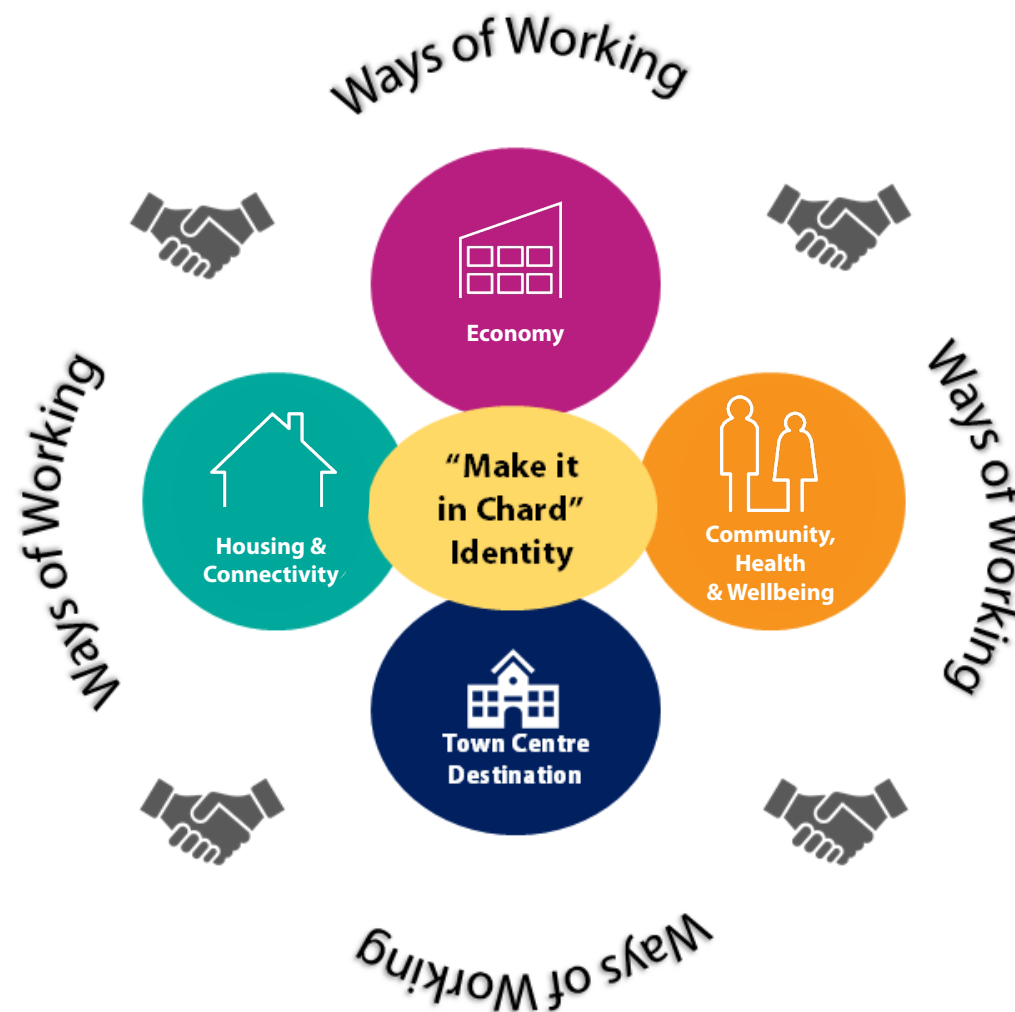


Figure 6: Priority Themes for Intervention

Cross Cutting Theme 1: Make it in Chard – a new identity

There is a lack of a coherent identity that Chard can focus on, organise around, and use to promote its Unique Selling Points whether this be to future residents, visitors, and investors (big and small). Its local attractions and assets are fragmented and don't contribute to one cohesive Chard experience, with no co-ordinated approach to online visitor information or physical signage/information/interpretation or use of digital media.

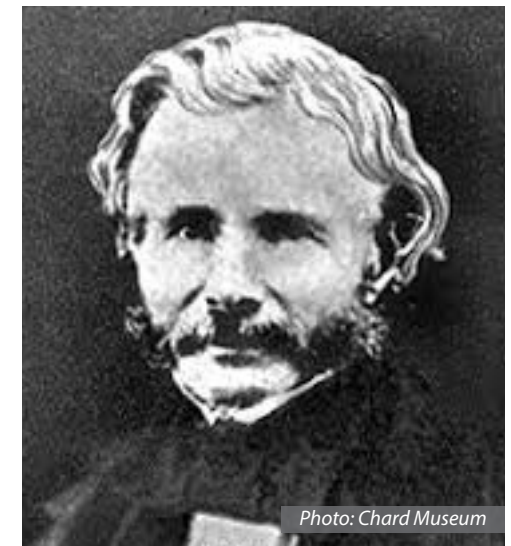
The principle of the 'Make it in Chard' campaign was first promoted in the 2010 Regeneration Vision as an idea encapsulating making your life in the town, and as an exhortation to businesses to invest and develop. This still rings true for Chard today.

A place brand campaign, however, needs to be more deeply owned by the town and reach across all aspects of the local identity. The Chard story needs to be part of a conversation that is the talk of the town, instils pride and promotes community confidence. Some of this will be digital, in a print medium and manifest through a physical presence in the town as well as through the people of Chard, local products, interpretation, events, festivals and more.

Make it in Chard

A community led place brand needs to be created that is owned from within Chard rather than imposed. This strategy has highlighted how the story of Chard and its future identity is truly holistic in nature, and needs to be embedded and celebrated across all the priority themes, converging on a single proposition – "Make it in Chard".

There is need for a clear storyboard and messages that provide direction on how the place identity is nurtured whilst also encouraging local businesses and community groups to express themselves within the overall Chard story. A supportive communications and marketing plan needs to guide such a process and should form part of any future way of working in the town.





Physical Markers

Chard needs to be known and announced to first time visitors and create a sense of pride and belonging for its residents. Strategic and local gateways need to be considered that make people aware of Chard and its identity with tourism signage, sculptures and other devices that are physical markers aligned to the wider town identity.

Events and Festivals

Events and festivals are a good way for the community to come together and showcase something unique about the town. For example, Hay on Wye is known for its annual literary festival, Henley for its regatta, Ludlow for its food festival amongst other known festivals. They tend to support a town's identity, its story, sense of place and develop skills from within a community and confidence in where people live.



Ambition for Chard's Identity – The Outcome

Establish a strong, positive identity for Chard as a place that stimulates and celebrates success. People can “make it” in Chard regardless of their background and previous life chances and local business have a strong reputation for quality produce and products reflecting the Chard brand and identity.

There will be a sense of pride, community cohesion and confidence among Chard residents and business. Chard town centre will be known as a destination of choice with a reputation as a welcoming place, having a strong local feel, a common purpose, clear identity and personality.

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Key Measures of Chard's Identity – The Output



A clear, community owned place brand identity for Chard established and articulated through local signage and events.



Positive feedback on changing perceptions of Chard from local residents, businesses and further afield.



Improved community confidence demonstrated through further engagement and active involvement in community life.

Key Actions & Activities – The Inputs for Change

- Develop a community driven place brand for Chard that is based on the idea of “Make it in Chard” and encapsulates digital and in-community activities and wraps around physical assets and thematic projects as identified within this strategy. This will also be integral to the future way of working across Chard (Cross Cutting Theme 2).
- Develop a physical signage strategy and brand markers that project the town’s identity at a strategy and local level through all routes, corridors and gateways to the town.
- Build on and further develop a year-round programme of events and festivals that underpin the “Make it in Chard” story.





Contribution to the Chard Vision:

Cross Cutting Theme 1: Make it in Chard – New Identity



Enterprise Chard

Stimulating a strong identity for Chard will promote Chard as an attractive and accessible business location fostering and supporting an enterprise culture.



Caring Chard

Stimulating a strong identity for Chard will create a place where people belong, feel cared for and are part of the community. Happiness, satisfaction levels and worthiness are valued with people looking out for one another.



Connecting Chard

The “Make it in Chard” story and identity links across all aspects of community life through physical place making campaigns and local conversations.



Destination Chard

Make it in Chard underpins the story of the town centre presenting an experience that is local, productive, animated with a sense of heritage and a community owned place.



Sustainable Chard

The identity for Chard is based on sustainable values of local, accessible and green which maximises the potential of the local community through social capital involvement and a commitment to low carbon; supporting future generations.

Cross Cutting Theme 2: New Way of Working

There are many community organisations that want the best for Chard but would be much stronger and effective if there was a common ground for sharing, promoting local issues and co-developing and delivering local solutions.

Build on the Community Response to Covid

During 2020, residents came together to respond to Covid. Over 200 volunteers supported over 1,000 residents directly with daily chores, shopping and building supportive social networks. In 2021, whilst the immediate pressure has reduced, local relationships are still being maintained with conversations ongoing through forums such as Chard Connect.

There is a wealth of transferable knowledge and skills that can further support ongoing community led action with the opportunity to align some of this human capital and energy to tackle many of the challenges facing Chard now and in the future.

Place Leadership

Building on the Covid-19 response and also the need for a more integrated approach to delivery in Chard, a number of stakeholders have identified whether a unified programme of place-based leadership would help understand everyone's respective skills, resources, assets, capacity and funding and how this can be pooled.

Whilst respecting individual organisations' roles and responsibilities, a Place Forum for Chard would help not just deal with management and governance but both technical and cross-sectoral place based solutions.



Photo: Microsoft

Ambition for Ways of Working – The Outcome

The local community and partner organisations are empowered to drive change through effective communication, networking and strong collaborative working.



Key Measures for Ways of Working – The Outputs



An effective partnership forum established providing a strong, and coherent community voice for Chard.

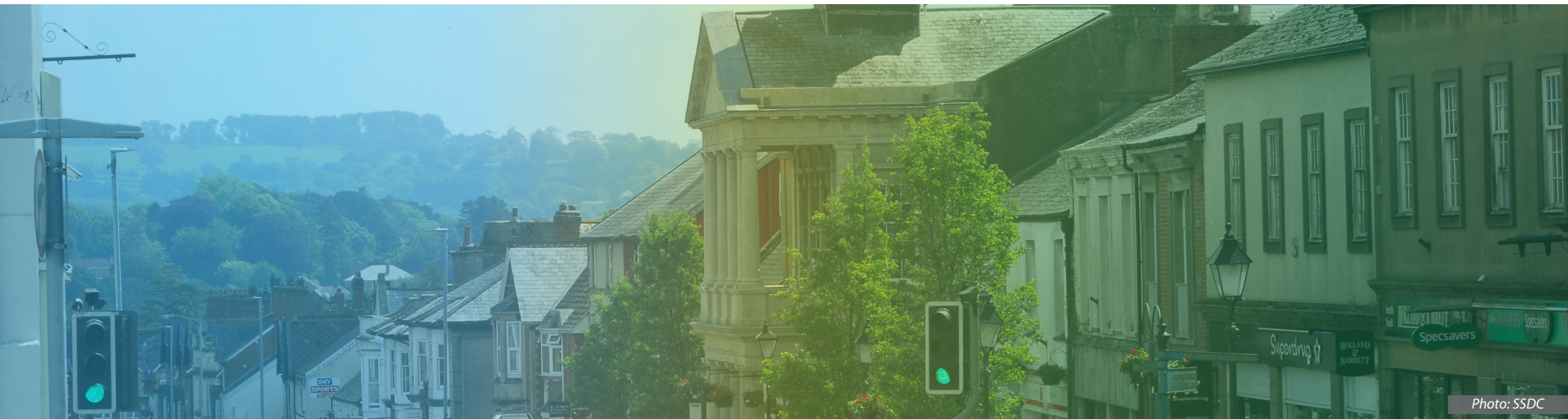


A place based resource management and delivery approach is developed.

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Key Actions & Activities – The Inputs

- Develop a Place Forum with partners as conduit for discussion, ideas and co-delivery of initiatives and projects arising from this strategy.
- Develop a place-based leadership programme for local partners to enable a common approach to local delivery. This can draw on previous good practice such as the LGA's Leading Places programme and also track MHCLG's current pilot programme "Partnerships for People & Place".
- Establish a parallel youth based forum to contribute to future leadership and strategic priorities from a young person's perspective.





Contribution to the Chard Vision:

Cross Cutting Theme 2: New Way of Working



Enterprise Chard

Developing new ways of working will create an environment for collaboration and partnership that bridges business with community helping to promote the Chard brand and engendering opportunities for social enterprise and innovation.



Caring Chard

Developing new ways of working will establish a forum and network that has wellbeing of local people at its heart with activities centred on support and community development.



Connecting Chard

Developing new ways of working will provide a common ground that brings together individual groups and organisations with similar agenda ideas and solutions connecting the whole of Chard.



Destination Chard

Developing new ways of working will make for a stronger community sense of belonging and commitment, stimulating renewed vibrancy and sense of place focused on the town centre as a stronger destination.



Sustainable Chard

New ways of working will embrace sustainable development principles through more efficient use of resources, localised management of facilities and more local access to services.



Priority Theme 3: Economy

Chard needs to diversify the local economy and deliver economic opportunities for a constrained labour market, and fulfil its role as a place for enterprise, learning and prosperity.

Chard is largely dependent on a handful of large employers and needs to broaden the employment base and stimulate a greater variety of economic opportunity in the town. Whilst there is a proud manufacturing history, there is a need for greater diversity of jobs that the existing workforce can transfer to as well as appeal to those young people who are working towards vocational qualifications. Ways of stimulating new sectors and clusters include partnerships with existing employers into growth areas such as innovation, research and development, establishing community and social enterprise models and development of short supply chains within Chard's rural hinterland.

Enterprising Chard

Chard will be a place recognised for enterprise and innovation with a flexible workforce and diverse employment prospects, including a new culture of business start-up success.

Key Measures of Chard's Identity – The Output



New businesses established and growing in Chard which support a broader employment base.



Strong local business network established in Chard, supporting each other, and encouraging new business enterprise opportunities.



Greater variety of school leaver outcomes including new enterprise starts by young people and locally based vocational and adult learning opportunities.



New business space delivered providing range of accommodation from pop-up, test venue, flexible work space, start-up and established business space.



Key Actions & Activities – The Inputs

- Establish Chard local employment hub delivering locally based employment services and advice.
- Explore potential to extend the hub facility as central training and advice provision and further extend into Flexible Work Hub in central location.
- Deliver Chard Enterprise Centre with Somerset County Council at Beeching Close Industrial Estate for new and fledgling businesses.
- Encourage local business network to establish – across Chard and with a sub-group focused on the town centre which could, in time, evolve into a formal Business Improvement District operation.
- Nurture new enterprise culture under “Make it in Chard” branding working with schools and colleges and other community partners to highlight business start up as realistic option alongside employment for new entrants to labour market and those seeking work opportunities.



Contribution to the Chard Vision:

Priority Theme 3: Economy



Enterprise Chard

Interventions in the economy will develop a more enterprising community culture, stimulate new business opportunities and open up new pathways for employment all helping to broaden the local economy.



Caring Chard

Interventions in the economy will create local job opportunities leading to improved economic and social wellbeing and broader social outlook for residents supporting a more inclusive and caring community.



Connecting Chard

Interventions in the economy will support development of new, flexible business space which are connected to communities and benefit from enhanced digital infrastructure and stronger local supply chains.



Destination Chard

Interventions in the economy will stimulate economic potential and business culture with the town centre, especially, being recognised as a place to live and work with wide range of stimulating activities fostering an enterprise culture.



Sustainable Chard

Interventions in the economy will support opportunities for new employment in the green economy, create more flexible working spaces which make use of renewable energy and are better connected by means of sustainable travel options, including walking and cycling.

Priority Theme 4: Community, Health & Wellbeing

Chard needs to enhance its community potential, health, wellbeing, and local life chances. There are long standing challenges of low social mobility, low income, and poor health indicators within several areas of Chard according to the national index of multiple deprivation. Localised disenfranchisement, especially among young people, expose communities to increased risks of crime and antisocial behaviour. General health and wellbeing are also affected in areas of poverty with additional risks of obesity locally and isolation; especially among those living alone.

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Photo: Sustrans

There are clear disparities within Chard and more generally in the long-term life outcomes for residents compared with the wider South Somerset and South West area. Parts of Chard are identified as being in the 20% most deprived locations across the whole of England with particular issues related to employment, education & skills, income, health & disability and crime challenges. Indeed, parts of the Holyrood Ward of Chard are highlighted as being in the 10% most deprived areas in England for education, skills and training.

National research demonstrates child poverty often leads to premature mortality and poor health outcomes as adults in later life. Actions which reduce the number of children experiencing poverty are shown to help improve the longer-term adult health outcomes in time.

Similarly, there are significant gaps around education achievement, progress and aspiration within the most deprived communities and the least engaged individuals in an area.

It is clear that while education and good quality jobs are crucial in 'getting ahead', many individuals are held back by a complex set of often inter-related factors such as low household income, housing issues, poor physical and mental health or disability along with poor transport and digital communications – all of which feature strongly in Chard. Communication, networking and strong collaborative working.



Caring Chard – The Outcome

Chard will be a place celebrated for its community spirit where people are encouraged to fulfil their potential and deliver solutions stimulating local connection, inter-generational support, and a renewed shared purpose and community wellbeing for all ages.

Key Measures – The Outputs



Increased economic activity rates across the whole community.



Improved social mobility, personal development and confidence, as well as a sense of achievement whether in terms of employment, earnings or community involvement.



Increased social engagement in community life leading to reduced social isolation and improved mental health.



More people adopting more active lifestyle choices, improving physical and mental health.

Key Actions & Activities – The Inputs

- Increase local access to adult learning and wider FE provision through digital learning and a hub-style facility.
- Explore emerging insights and good practice locally with Abri to extend similar provision and access to community support throughout Chard.
- Draw on wider social mobility initiatives with strategic partners to develop a Chard focused pilot programme with local residents.
- Introduce Chard Youth Achievement Awards to stimulate local role models and raise local aspiration and potential.
- Co-ordinate and promote access to sports and recreation provision across the town to meet current and future population growth.
- Enhance and promote active travel routes and corridors through delivery of Local Cycling & Walking Investment Plan (LWCIP) – see also Priority Theme 6.
- Encourage healthy eating through links to local agriculture and opportunities for community growing.
- Work in partnership with others to facilitate expansion of local GP and community health services and wellbeing in the town centre and work with partners to retain and enhance the quality and range of locally delivered community and urgent health services in Chard.

Case Study: Abri Community Investment Plan 2021

Abri is the main social housing provider in Chard, with over 1,100 properties. They are committed to investing in people and supporting local communities integral to their housing role. Targeted community support is provided across three strategic community priorities of:

Employment – helping to make their tenants ‘work-ready’ and raising ambition through training.

Health & Wellbeing – helping to tackle social isolation as well as drug and alcohol dependency.

Community Empowerment – working with community ambassadors to help engage with tenants, respond to their issues when raised and encourage community activity and integration.

Collaboration with Abri will encourage further community integration and access to support from their tenants whilst there are also strong lessons to be learned from the Abri approach that can benefit the wider Chard communities toward greater social cohesion.





Contribution to the Chard Vision:

Priority Theme 4: Community, Health & Wellbeing



Enterprise Chard

Tackling community disadvantages will strengthen the local labour market, increasing business capacity, skills and enterprise culture.



Caring Chard

Improvements in community, health and wellbeing will engender a broader social outlook, ambition and aspiration for residents supporting a more inclusive and caring community.



Connecting Chard

Interventions will support a more inclusive and supported community throughout Chard. All neighbourhoods will contribute to future success and be part of a better connected Chard physically and emotionally and with a stronger community voice.



Destination Chard

A healthier and engaged community will stimulate local ownership, commitment and pride in the sense of place that is Chard which in turns captures wider interest and inspires others to invest.



Sustainable Chard

Greater social inclusion and personal wellbeing is integral to the long term social sustainability of Chard.

Priority Theme 5: Town Centre Destination

Chard's town centre needs to continue to repurpose itself adding value to the physical regeneration investment and reinforcing the town centre as the hub for community life.

The town's identity has been a constant area of focus with a need to be more expressive and positive about the heritage of the town and project its sense of place and confidence going forward. Identity isn't about a logo and a strapline but about how the town's story is presented within its physical fabric and talked about on the streets of Chard.

The town centre can help support this narrative through good design principles that use local materials, colour palette, signage typeface and opportunities for local interpretation and use of artwork.

Initiatives such as the HSHAZ can begin to stimulate opportunities for others to animate empty or underused buildings by channelling local products, activities and enterprise that celebrates the best of Chard and its rural hinterland. This will help develop Chard town centre as a living and working neighbourhood that meets

a diversity of community needs. Through for example repurposing upper floors to provide more town centre activity and provision of co-working space for micro and SME business all of which lead to a town centre that has a strong sense of community and activity.

Markets and events such as the carnival are also important in terms of animating streets and spaces, contributing to the atmosphere and spirit of the place and user experience.

Delivery of the new Chard Leisure Centre is about placing key generators of activity

within the core town centre that have a mutual benefit for residents and local businesses and lead to a cycle of related growth and activity.

As part of ensuring the town centre has a community focus and residents can easily access local services and advice, the need for a central hub building has been identified through consultation. This needs to provide a flexible series of spaces that are adaptable, practical and accessible to all and can evolve with different functions through the day and on into early evening activities.



Image: LHC



Destination Chard - Outcome

Chard town centre will be a place that draws people to its culture, creativity, and local amenities. An inspiration and enabler of community life.

Key Measures of Chard's Identity – The Output



More diverse uses and activities in the town centre – vacancy rate below the national average.



Increased footfall with visitors returning more often, spending more and staying longer.



Chard town centre will have a distinctive and diverse nighttime economy that celebrates local food and drink, arts and culture and has spaces for events and activities appealing to a wider range of community interests and ages.



Investment and activity in the town centre will create a visitor experience that is safe and leads to an engaging atmosphere.

Key Actions & Activities – The Inputs

- Maximise the benefit of a town centre located leisure centre with strong linked activity, clear physical linkages and joint marketing of town centre activities.
- Develop leisure and wellbeing cluster approach to integrate the leisure centre with wider business opportunities and complementary events.
- Develop town centre business network as part of wider engagement with longer term potential to form a Chard Business Improvement District.
- Develop plans to animate and activate key places and spaces created from the Town Centre public realm improvements.
- Support interim, meanwhile uses for unoccupied properties.
- Provide retail mentoring scheme to support existing town centre businesses develop and refresh skills in merchandising etc, encouraging more proactive and responsive business environment.
- Develop markets and events programme which complements the “Make it in Chard” place branding.
- Develop broader nighttime economy through encouraging flexible and diverse uses of places and spaces for evening entertainment, wider cultural events and activity to stimulate evening footfall and attraction.
- Effectively manage and curate the visitor arrival and destination experience through gateway signage, clarity of parking locations and options and improved walking and cycling pathways and links to local amenities and spaces as part of the wider Chard experience.

Contribution to the Chard Vision:

Priority Theme 5: Town Centre Destination



Enterprise Chard

Interventions will create a stronger town centre environment which promotes new enterprise opportunities, encourages new business starts in the town centre and provides a conduit for rural goods and produce.



Caring Chard

Interventions in the town centre will create a vibrant place that is inclusive and welcoming to all, providing community services that support the wellbeing of individuals and groups.



Connecting Chard

Interventions will create a town centre that is strongly connected to its neighbourhoods, is easily accessible to all both physically and digitally stimulating a strong sense of local belonging and identity.



Destination Chard

Interventions in the town centre will create a stronger identity for the town, providing a breadth of activity appealing to all users and visitors.



Sustainable Chard

Interventions in the town centre will create a place that has sustainability embedded into its core offer, experience and identity, promoting low carbon accessibility and embracing local services and supply chains.



Priority Theme 6: Housing & Connectivity

Chard needs to carefully manage its planned growth in an inclusive and sustainable manner, ensuring all areas are connected (physically and emotionally) creating a great place to live which respects its community and environmental assets.

New Homes Need to Belong to Chard

Further work is underway to review the issues and options for delivering the planned Eastern Relief Road, the outcome of which will need to be clearly communicated with residents. Furthermore, the Local Plan review provides the opportunity to refresh the overall housing delivery programme and re-engage the community. The wider implications for local traffic will also need to be addressed in a comprehensive manner through a joined-up review of local connectivity, walking and cycling routes and response to the issues highlighted within a sustainable transport and management plan for the whole of Chard which will also help tie the urban extensions into the wider social and community fabric of the area by reinforcing important connecting corridors and desire lines/routes.

As new housing is delivered every opportunity should be taken to raise awareness among new residents of the local community capacity and facilities across Chard. Delivery of new schools and enhanced provision of playing fields will have a vital role to play to integrate the urban extensions as belonging to Chard as a whole.

Chard Needs to Become a Series of Connected Neighbourhoods

The location of Chard in South Somerset presents strategic benefits as it looks to the rural countryside and out to the south Dorset coast. This also brings challenges, however, as traffic and transport are perceived by the local community to be key issues as the A30 and A358 traverse directly through to the town.

These trunk roads contribute to severance within places like Chard as neighbourhoods are contained and lack permeability, leading to an imbalance in the hierarchy between vehicles and people.

This severance does not lead to Chard being a cohesive place resulting in residents having no option but to use their car for mostly short trips to destinations such as the local schools, health centres and other local services. This in turn results in a traffic-dominated town centre.

There is, therefore, a need to adopt a “hub and spoke” approach to Chard that ensures accessibility within its neighbourhoods but also provides accessible and legible routes into the town centre that are as direct as possible, work with the local character to retain and improve local biodiversity and also promote walking and cycling for all ages through development of a Local Cycling & Walking Investment Plan (LCWIP).



Connected Chard – The Outcome

Chard will fulfil its growth objectives, creating a sustainable, connected and joined up community benefitting the whole of Chard. Chard will also be easy to get to, easy to move around and to access the green community spaces open countryside.

Key Actions & Activities – The Inputs



Delivery of planned new housing across Chard by the development industry.



Provision of active travel routes and corridors and other local safety improvements.



Reduced town centre traffic and delivery of a range of alternative sustainable transport options for local travel.

Key Actions & Activities – The Inputs

- Re-engage the local community with the plans for housing growth and clarify delivery proposals, building community confidence through the Local Plan Review and preparation of the Infrastructure Delivery Plan.
- Continue to work proactively with the development industry to deliver the planned new housing growth and explore options for delivering the Chard Eastern Relief Road.
- Develop an active travel network (LCWIP) with priority links and routes responsive to community demand and needs.
- Prioritise safer walking and cycling within the highway network into and through the town centre with roads becoming streets in the local hierarchy.
- Promote and enhance the Stop Line (Sustrans Route 33) as a key resident and visitor corridor with improved legibility through the town centre and opportunities for local business.
- Explore funding opportunities with partners to support development of green transport options for Chard. This could, for example include: community based, “on-demand” bus service and promotion of low emission / cycle friendly regional bus services to attract visitors.
- Promote provision of electric vehicle charging points at strategic locations in the town.
- Explore potential for innovative solutions to retain local spending and connectivity through, for example electric-cargo bikes as part of a local shopping service, development of local e-commerce and carbon-neutral last-mile delivery service.



Contribution to the Chard Vision:

Priority Theme 6: Housing Connectivity



Enterprise Chard

New housing growth is integral to furthering Chard's economic prosperity attracting new residents, new skills and enhancing the local labour market capacity. Connecting housing with sustainable transport options ensures all neighbourhoods are easily linked to local employment sites and the town centre.



Caring Chard

Connecting local housing will create strong neighbourhoods as places to live that feel a part of Chard with infrastructure designed to support mobility and access to health and other community facilities.



Connecting Chard

Local housing will feel connected and part of Chard with strong linkages providing choice of active travel, green routes and spaces that connect and engage with community life opening up creative opportunities for all.



Destination Chard

Connecting local housing and neighbourhoods will enhance the overall sense of place and identity that is Chard as place to live, work and celebrate success. Residents will look to Chard town centre as first choice destination for shopping, local services, arts, culture, work and evening entertainment.



Sustainable Chard

Integrating green and low-carbon travel choices and options as part of the town's infrastructure will ensure Chard continues to develop in a sustainable manner contributing to local biodiversity, productive landscapes and the long-term health and wellbeing of both people and place.



Action Plan & Delivery

The detailed actions and initiatives for realising the strategic ambitions for Chard are presented in the accompanying Technical Appendix and summarised in the tables overleaf.

The planned actions are intended to build on existing projects and commitments which will contribute to the future success of Chard.

Some of the proposed actions are already included in operational programmes and are budgeted for. Others will need to be developed further and delivered in partnership with other stakeholders.

Yet more will be subject to further collaborative work and feasibility testing and will inform future funding bids to government and other partners. Other project ideas will also emerge over time with decisions taken on how best to proceed based on the contribution to the overarching vision and strategic ambition for Chard's Future.

Chard Future Strategy 2021-2035 - Action Plan Framework		Programme			Vision & Outcomes				
		2021 - 23	2023 - 28	2028 - 35	Enterprising	Caring	Connected	Destination	Sustainable
Cross Cutting Theme 1: Identity									
I1	Develop community driven place brand "Make it in Chard" community driven place brand "Make it in Chard"	●	●	●	●	●	●	●	●
I2	Develop signage strategy and brand markers to promote the Chard identity	●	○	○	●	●	●	●	●
I3	Develop year-round events and festivals programme celebrating the Chard identity	●	●	●	●	●	●	●	●
Cross Cutting Theme 2: New Way of Working									
WoW1	Develop virtual "Place Forum" connecting Chard partners and community organisations	●	○	○	○	●	●	●	●
WoW2	Develop place-based leadership programme	○	●	○	●	●	●	●	●
WoW3	Establish a Chard Youth Council or Young Citizen Forum	●	○	○	○	●	●	●	●
WoW4	Establish Chard community organisation data-base and knowledge bank	●	○	○	●	●	●	●	●
WoW5	Explore opportunities for joint service delivery	○	○	●	●	●	●	●	●
Priority Theme 3: Economy									
E1	Maintain the Oscar Mayer task-force support for people back into employment	●	○	○	●	●	●	●	●
E2a	Pilot the local "employment hub" as a central location for information and advice	●	○	○	●	●	●	●	○
E2b	Develop broader range of local services as Employment & Training Hub	○	●	○	●	●	●	●	●
E3	Develop a Chard Business Network	●	○	○	●	●	●	●	○
E4	Develop "Make it in Chard" programme with schools and business - pathways to business	●	○	○	●	●	●	●	●
E5	Consider intense enterprise facilitation programme throughout Chard	○	●	●	●	●	●	●	●
E6	Develop rural business cluster with relationship to Chard - showcase "Make it in Chard"	●	●	●	●	●	●	●	●
E7	Deliver Chard Enterprise Centre as part of the Somerset Enterprise Network	●	○	○	●	●	●	●	●
E8	Deliver Flexible Work-Hub in town centre - multi-use facility (linked to E2b)	○	●	○	●	●	●	●	●
E9	Explore the Young Somerset Project - stimulate youth enterprise activity	●	○	○	●	●	●	●	●

Chard Future Strategy 2021-2035 - Action Plan Framework		Programme			Vision & Outcomes					
		2021 - 23	2023 - 28	2028 - 35	Enterprising	Caring	Connected	Destination	Sustainable	
Priority Theme 4: Community, Health & Wellbeing										
CHW1	Provide adult learning opportunities in Chard - central digital hub provision									
CHW2	Build on Abri's emerging good practice community engagement and employment support									
CHW3	Develop regional social mobility programme and pilot local initiative									
CHW4	Introduce Chard Youth Achievement Awards									
CHW5	Develop digital training hub - linked with CHW1 and E2a above									
CHW6	Deliver sports and recreation facilities in line with housing growth									
CHW7	Promote active travel routes and develop Local Walking & Cycling Investment Plan									
CHW8	Encourage healthy eating through links to local agriculture and opportunities for community growing									
CHW9	Develop social prescribing programme, encourage healthy eating linked with community growing									
CHW10	Enable GP surgery expansion in the town centre									
CHW11	Retain and enhance local delivery of primary, community and urgent health services									
Priority Theme 5: Town Centre Destination										
TC1	Maximise benefits of the Leisure Centre in the town centre - signage/marketing/public realm									
TC2	Develop leisure and wellbeing cluster around the new Leisure Centre									
TC3a	Encourage a town centre business network linked with E3 on the previous page									
TC3b	Promote potential for a Business Improvement District									
TC4	Animate the places and spaces created through the public realm programme									
TC5	Develop meanwhile use programme for empty properties									

Chard Future Strategy 2021-2035 - Action Plan Framework		Programme			Vision & Outcomes				
		2021 - 23	2023 - 28	2028 - 35	Enterprising	Caring	Connected	Destination	Sustainable
Priority Theme 5: Town Centre Destination									
TC6	Provide a retail mentoring scheme to support local traders	●	○	○	●	●	●	●	○
TC7	Develop markets and events programme on Made in Chard theme	●	●	○	●	○	●	●	●
TC8	Promote night-time economy - initially through pop-up events to build market confidence	●	●	○	●	●	○	●	●
TC9	Develop arrival management plan and circuit encouraging dwell time	●	●	○	●	●	●	●	○
TC10	Implement town parking proposals from the Transport & Movement Appraisal	●	●	○	●	○	●	●	●
TC11	Test potential for town centre community hub building (linked with E2b E3 CHW1 CHW 5)	●	●	○	●	●	●	●	●
TC12	Develop stronger town centre walking circuit - connecting key assets and destinations	●	○	○	●	●	●	●	●
Priority Theme 6: Housing & Connectivity									
HC1	Produce Chard LCWIP and develop active travel network including initiatives to manage demand	●	●	●	○	○	●	●	●
HC2	Enhance walking and cycling safety along the A358	●	○	○	●	●	●	●	●
HC3	Develop cross-town linkages and key routes	●	●	○	●	●	●	●	●
HC4	Further develop Stop Line as primary route and destination facility	●	○	○	●	●	●	●	●
HC5	Develop green transport infrastructure including community bus and EV charging facilities	○	●	○	●	●	●	●	●
HC6	Promote e-cargo bike service for local delivery/last mile connections	●	○	○	●	●	●	●	●
HC7	Re-engage community with housing growth plans and delivery programme	●	○	○	○	●	●	●	●

Figures

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Image: SSDC

Figure 1: Chard; a history of achievements

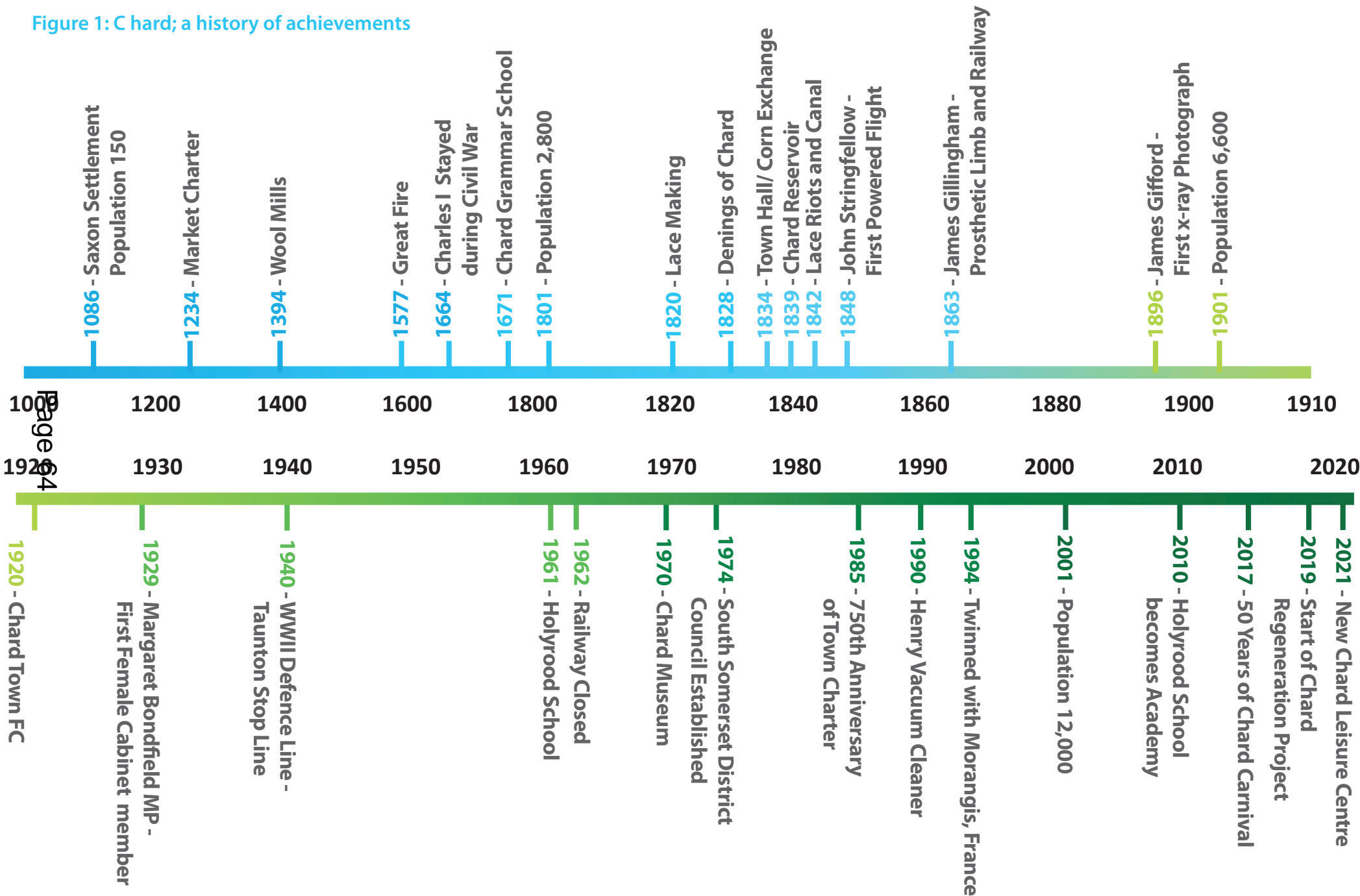


Figure 2: Chard Strategic Location

Source: based on Ordnance Survey data under SSDC Licence agreement



Figure 3: Chard Vision and Strategic Outcomes

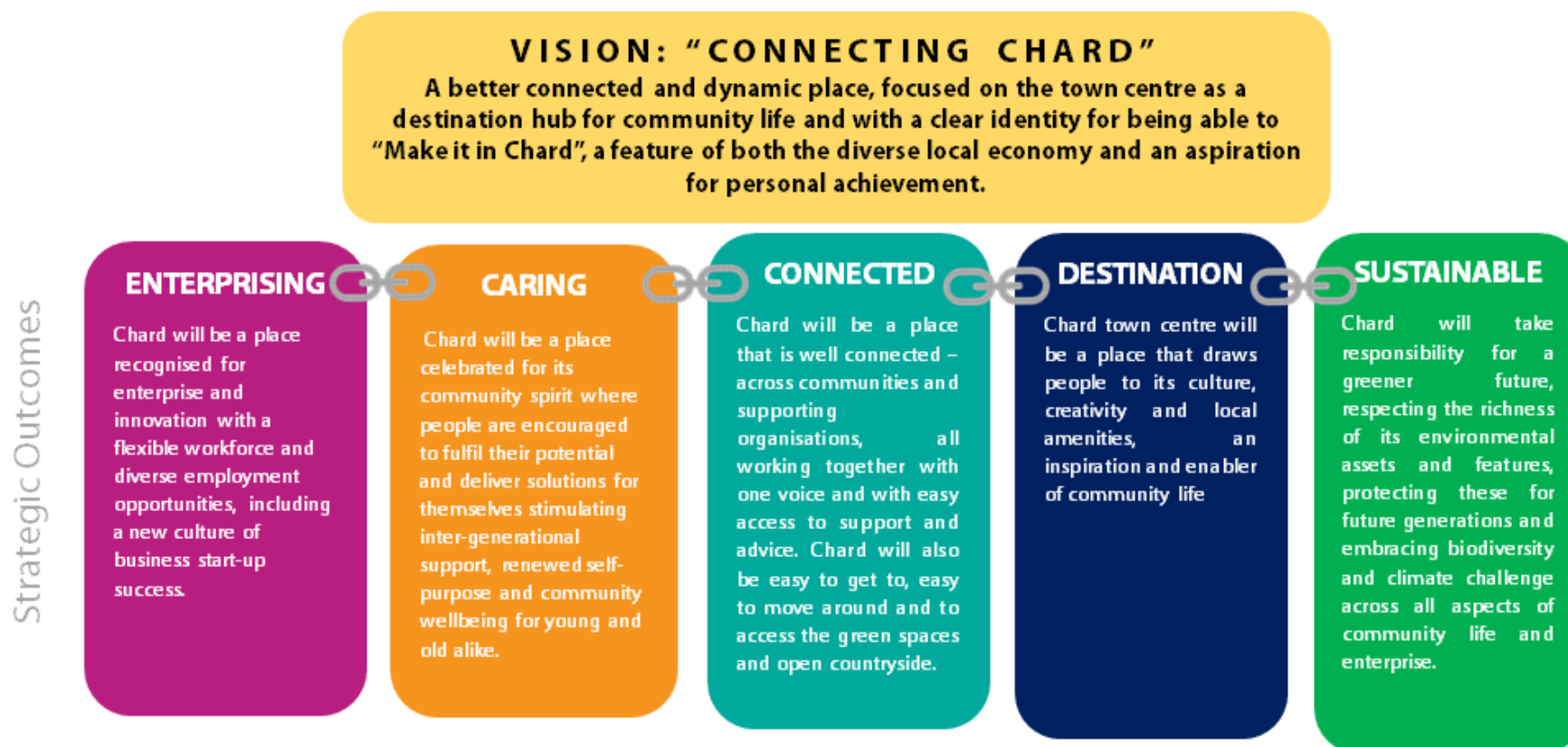
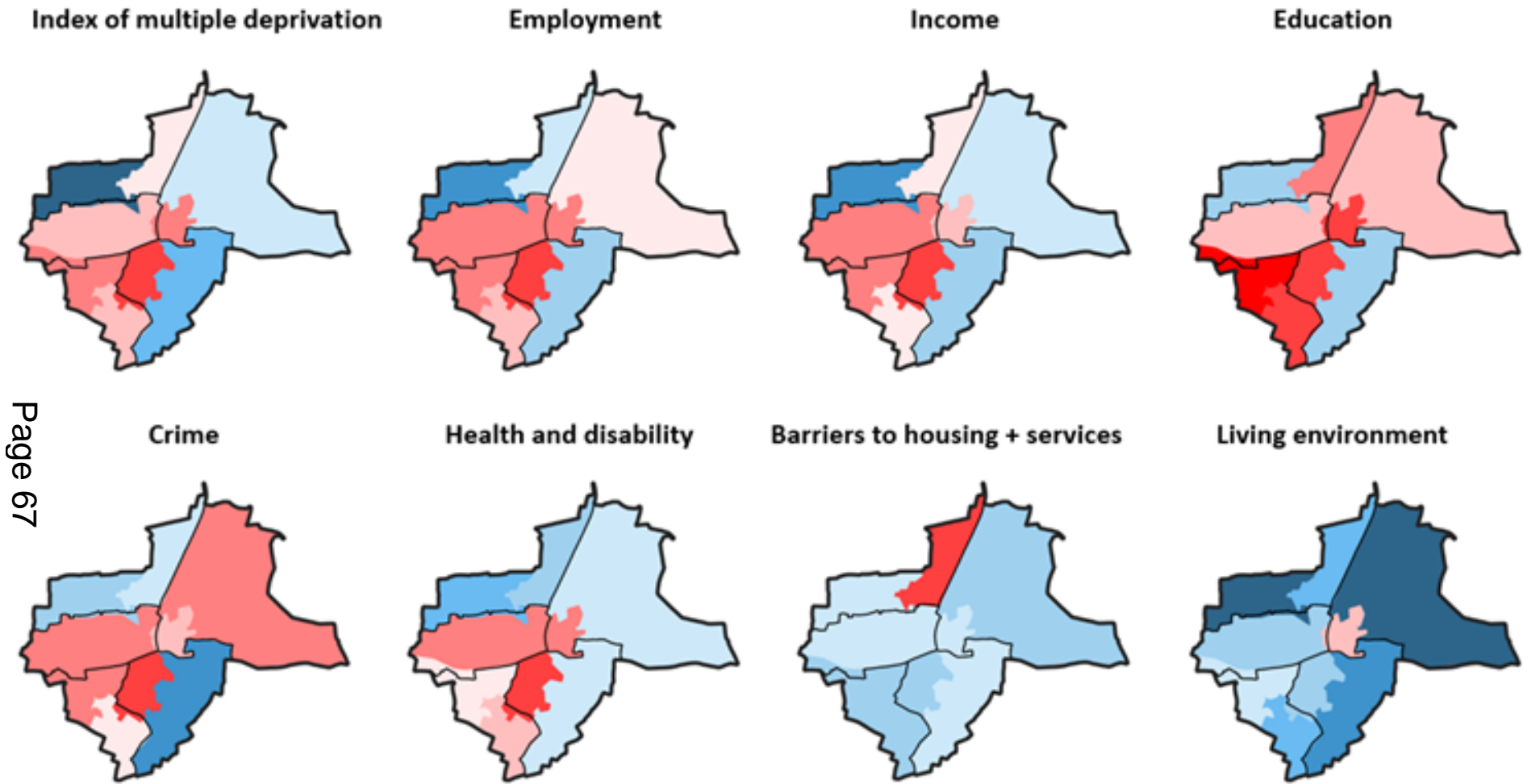


Figure 4: Chard: Indices of Deprivation 2019



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Deprivation Decile (where 1 is most deprived 10% of LSDAs in England)



Source: MHCLG, English Indices of Deprivation, 2019.

Figure 5: Chard: Key Features & Assets

Source: based on Ordnance Survey data under SSDC Licence agreement

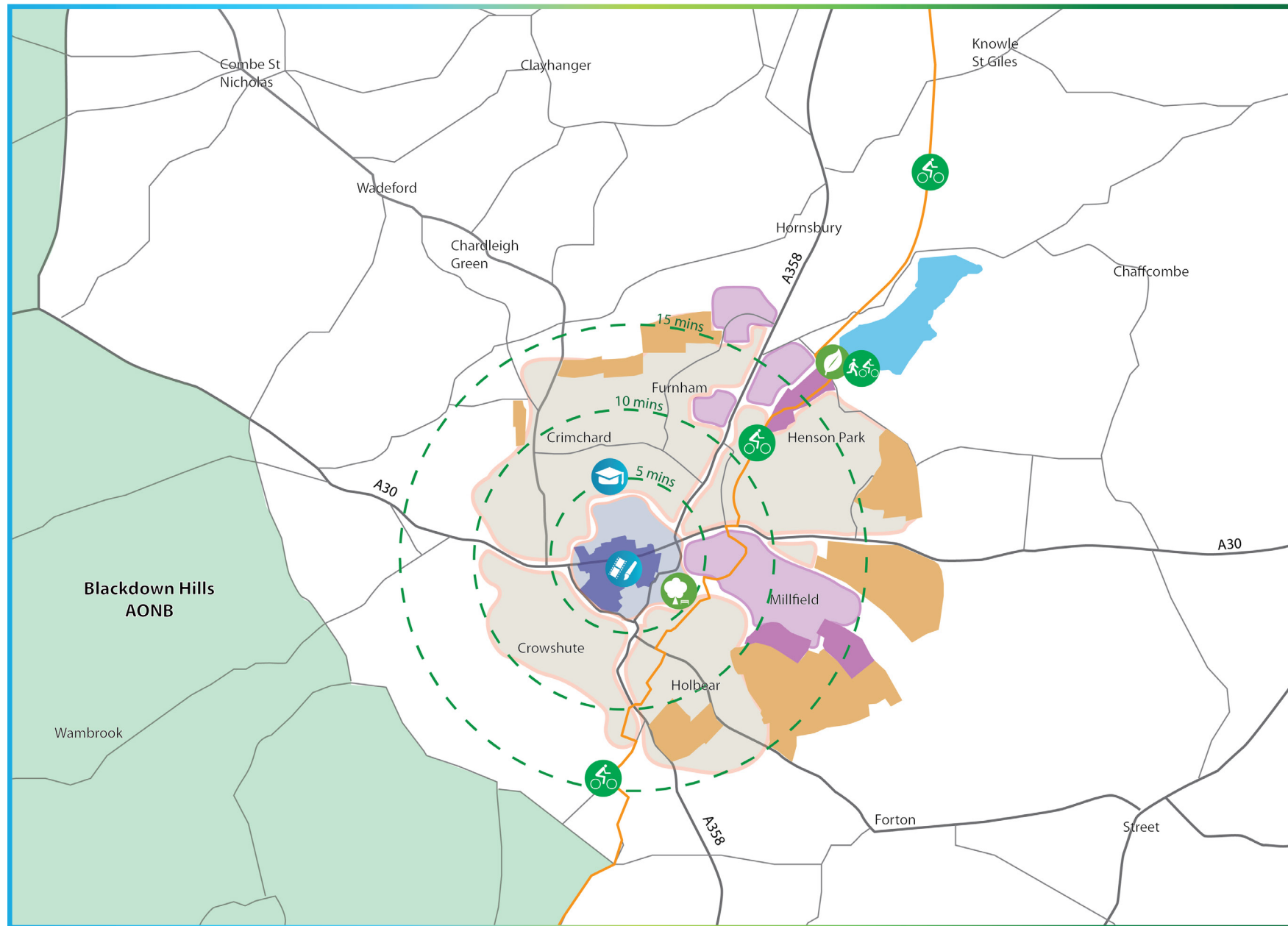


Figure 6: Priority Themes for Intervention





**South Somerset
District Council**

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Future Chard Strategy

Actions & Initiatives Framework 2021 - 2035



Cross Cutting Theme 1: Make it in Chard – New Identity



Ambition for Chard - Outcome: Establish a strong, positive identity for Chard as a place that stimulates and celebrates success. People can “make it” in Chard and local businesses have a strong reputation for quality produce and products, reflecting the Chard brand and identity.

Key measures - Outputs: A clear, community owned place brand identity for Chard. Positive feedback on changing local and external negative perceptions. Improved community confidence demonstrated through engagement and active involvement in community life.

Photo: Microsoft

Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>I1 - Develop and roll out a community driven place brand for Chard that is based on the idea of “Make it in Chard”. This isn’t just a logo, but a narrative and story that celebrates Chard as a place, its history, its assets, its people and brings together the parts into a cohesive identity. Consider both digital and in-community activities and how the brand wraps around physical assets and thematic projects. This includes:</p> <ul style="list-style-type: none"> Development of a Chard Business Network Rural business cluster promotion Potential hub building Youth achievement awards Meanwhile and pop-up projects Markets and event programme Evening time economy activity 	<ul style="list-style-type: none"> Chard Regeneration Plan 2010 Chard Future Strategy 2021 	<ul style="list-style-type: none"> South Somerset DC Proposed Business Network Chard Town Council Chard Connect 	Make it in Chard becomes a known brand and story that local residents’ feel proud of, rally around and support. Visitors are drawn to the personality of the town.			
<p>I2 - Develop a physical signage and brand markers initiative that project the town’s identity at a strategic and local level through a number of transport corridors, outer and inner gateways and public spaces.</p>	<ul style="list-style-type: none"> Chard Town Centre Public Realm Strategy 	<ul style="list-style-type: none"> South Somerset DC Proposed Business Network Chard Town Council Chard Connect 	Chard presents strong first impressions to visitors through an identity that is coherent and distinctive.			
<p>I3 - Build on, develop, and deliver a year round events and festivals programme that underpins the Chard story. To support existing groups such as Chard Carnival and other town organisations with existing events and find ways of sharing resources, equipment, and skills so that there are mutual benefits for all.</p>	<ul style="list-style-type: none"> Culturally Chard High Street Heritage Action Zone (HSHAZ) Cultural Programme 	<ul style="list-style-type: none"> South Somerset DC Proposed Business Network Chard Town Council Chard Connect 	Chard events have a reputation of being community grown, rooted in its place and the warmest of welcomes.			



Cross Cutting Theme 2: New Way of Working

Ambition for Chard - Outcome: The local community and partner organisations are empowered to drive change through effective communication, networking and strong collaborative working.

Key measures - Outputs: An effective partnership forum established providing a strong and coherent community voice for Chard.

A place based resource management and delivery approach developed

Photo: Microsoft

Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>WoW1 - Develop a "Place Forum" with partners as a conduit for discussion, ideas and co-delivery of initiatives and projects. The forum will link into other groups in Chard such as:</p> <ul style="list-style-type: none"> Proposed business network Chard Churches Together Proposed Youth Council Sustainable Chard <p>The forum could follow the themes of this Future Chard Strategy with thematic leads/champions supporting task-finish groups, all feeding back to the main Forum.</p>	<ul style="list-style-type: none"> Future Chard Strategy 2021 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect and respective organisations 	Chard has visible and cross community leadership amongst organisations through an accessible, transparent and action-based Forum.			
<p>WoW2 - Develop a place based leadership programme for local partners that enables a common approach to place leadership and delivery across Chard. Training and coaching could be through peer-to-peer provision or through invited speakers and trainers.</p>	<ul style="list-style-type: none"> Future Chard Strategy 2021 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect and respective organisations 	Town organisations are skilled, confident, and empowered to work in an integrated way.			
<p>WoW3 - Establish a Chard Youth Council or Young Citizen Forum to contribute to future leadership and strategic priorities from a young person perspective. The Forum could shadow the Town and District Council responsibilities and could be given small budget for specific youth projects.</p>	<ul style="list-style-type: none"> Future Chard Strategy 2021 	<ul style="list-style-type: none"> Chard Town Council Chard Youth Centre Local schools Chard Connect and respective organisations 	Young people are seen as positive role models within Chard community, inspiring peers and forming positive partnerships with other groups and members of the community.			
<p>WoW4 - Establish a single, interactive, community organisation listing database and knowledge bank that is managed digitally across the community.</p>	<ul style="list-style-type: none"> Future Chard Strategy 2021 	<ul style="list-style-type: none"> Chard Connect Chard Town Council 	Open access to information makes Chard an informed and coordinated place for community action and services.			
<p>WoW5 - Explore opportunities for joint service delivery that maximise budgets, smarter procurement and value for money.</p>	<ul style="list-style-type: none"> Future Chard Strategy 2021 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Other strategic and local agencies 	Local services are delivered in Chard through smart procurement and service delivery ensuring public money is spent effectively.			

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Priority Theme 3: Economy



Ambition for Chard - Outcome: Chard will be a place recognised for enterprise and innovation with a flexible workforce and diverse employment prospects, including a new culture of business start-up success.

Key measures - Outputs: New businesses established and growing in Chard supporting a broader employment base. Strong local business network established in Chard supporting each other and encouraging new businesses enterprise opportunities. Greater variety of school leaver outcomes including new enterprise starts and locally based vocational and adult learning opportunities.

New business space delivered providing range of accommodation from pop-up, test venues, flexible work space, start-ups and established business space.

Photo: Microsoft

Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>E1 - Maintain the task-force approach in response to Oscar Mayer closure to support employees at risk to source alternative opportunities and prepare themselves for interview. This will include English language skills and help where digital access is limited.</p>	<ul style="list-style-type: none"> South Somerset District Council Economic Strategy 2019 Somerset Growth & Recovery Plan 2021 	<ul style="list-style-type: none"> South Somerset DC Somerset CC DWP Job Centre + CAS 	Minimise impact and disruption to local labour market and individual families' income and prosperity. Reduce social and economic cost of unemployment and benefit dependency.			
<p>E2 - A) Pilot the proposed "employment hub" through co-locating local employment services and advice, initially in response to Oscar Mayer closure but also make available to all residents in Chard. B) Evaluate the success and explore how to strengthen local services in the longer term and potential broaden into an employment/training and community/work hub and develop a youth leadership initiative.</p>	<ul style="list-style-type: none"> South Somerset District Council Economic Strategy 2019 Somerset Growth & Recovery Plan 2021 Community Renewal Fund 	<ul style="list-style-type: none"> South Somerset DC Somerset CC DWP Job Centre + CAS 	Closer engagement with people seeking employment and/or training and those looking to improve prospects and earnings. Links with business through job-match opportunities and tackling recruitment barriers.			
<p>E3 - As an integral part of the cross-cutting priority "Ways of Working", there is need for Chard businesses to come together as part of a local business network or organisation that enables dialogue, a conduit for ideas and initiatives and for collective working with other town organisations and groups.</p>	<ul style="list-style-type: none"> Chard Regeneration Plan 2010 	<ul style="list-style-type: none"> South Somerset DC Local businesses 	A stronger voice for local businesses focussed on business needs.			
<p>E4 - As part of the cross cutting priority towards a fresh identity and the "Make it in Chard" place-brand, develop a role model programme between employers, entrepreneurs, local schools and further education colleges to demonstrate how individuals can also "make it" in Chard. For example, see the former Careers Wales Dynamo programme.</p>	<ul style="list-style-type: none"> Chard Future Strategy 2021 	<ul style="list-style-type: none"> South Somerset DC Somerset CC Holyrood Academy Employer cluster 	Young people are inspired and motivated to explore an entrepreneurial pathway leading to increase in start ups and young ambassadors.			



Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>E5 - Consider intense programme of enterprise facilitation to generate ideas and local potential. This could, for example, follow techniques such as that developed by the Sirolli Institute which has proved effective in other similar locations e.g. Effect Blaenau Gwent (former coal and steel industrial area).</p>	<ul style="list-style-type: none"> • South Somerset DC Economic Strategy 2019 • SSDC Corporate Plan • Builds on Action 4 above • Made in Chard 	<ul style="list-style-type: none"> • South Somerset DC 	<p>Long term stimulation of social mobility through motivation and recognition of potential making business enterprise a realistic prospect.</p>			
<p>E6 - Develop a rural business cluster that has a relationship to Chard. Support for rural business with short supply chain development, marketing and promotion, logistics and local distribution, green credentials and linking into town centre offer. Need to showcase Chard products through physical and digital channels. Work with HSHAZ on opportunities through meanwhile and tester space and other initiatives.</p>	<ul style="list-style-type: none"> • South Somerset Economic Development Strategy 2019 • Rural Development Plan 2017-2020 	<ul style="list-style-type: none"> • South Somerset DC • Rural business cluster • Proposed Business Network 	<p>A strong rural business identity that is recognised within the South West and UK and becomes part of the “Make it in Chard” story and brand, that is town wide and celebrated within the town centre.</p>			
<p>E7 - Deliver the new Chard Enterprise Centre – as part of the Somerset Enterprise Network managed by Somerset County Council providing formal office space at Beeching Close Industrial Estate.</p>	<ul style="list-style-type: none"> • South Somerset DC Economic Development Strategy 2019 • Somerset Growth & Recovery Plan 2021 	<ul style="list-style-type: none"> • South Somerset DC • Somerset CC 	<p>Managed and supported high quality business space for new and growing SMEs providing a dynamic business network with intense business support.</p>			
<p>E8 - Progress a town centre based Flexible Work Hub which provides space for multi-faceted activities with training, advice, signposting, retail mentor/shop doctor, test space and links to local schools, FE and employers as well as local community enterprises. This will focus on early start / concept business and act as feeder to more established business options either in the town centre or the SCC managed - Chard Enterprise Centre (E7).</p>	<ul style="list-style-type: none"> • Work Hub Feasibility Study 2021 • Builds on Actions E2 E4, E5 & E6 above 	<ul style="list-style-type: none"> • South Somerset DC • Somerset CC • DWP • Job Centre + • FE • Holyrood Academy • Proposed Business Network 	<p>A dynamic work hub destination that provides a pathway from pre-employment to business support/growth, coaching and training and is a known springboard facility for grow on enterprises.</p>			
<p>E9 - Explore the Young Somerset Project and look at transferability of ideas and models for youth enterprise activity that activates redundant town centre space and provides a springboard for local growth and a more diverse experience for all ages.</p>	<ul style="list-style-type: none"> • Post 16 Strategy and Plan • High Street Heritage Action Zone 	<ul style="list-style-type: none"> • South Somerset DC • Somerset CC • Holyrood Academy • Chard Youth Centre 	<p>Young people have strong life skills and confidence in enterprise and an enhanced pathway, with Chard town centre providing an age balanced and animate experience for all.</p>			



Priority Theme 4: Community, Health & Wellbeing



Ambition for Chard - Outcome: Chard will be a place celebrated for its community spirit where people are encouraged to fulfil their potential and deliver solutions for themselves stimulating local connection, inter-generational support, renewed self-purpose, improved physical and mental health and community wellbeing for all ages.

Key measures - Outputs: Increased economic activity rates across the whole community. Improved social mobility, personal development and confidence. Improved earnings. Increased social engagement and involvement in community life leading to reduced social and isolation and improved mental health. More people adopting more active lifestyle choices, improving physical and mental health.

Photo: Susstrans

Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
CHW1 - Increase skills and employment opportunities for residents, especially from the Holyrood Ward, by enhanced local access to adult learning and wider FE provision locally through continued digital delivery.	<ul style="list-style-type: none"> Linked to Economy and Employment Skills Hub Activity E2 and E8 	<ul style="list-style-type: none"> Holyrood Academy Yeovil College 	Wider choice of vocational training and access to locally delivered adult learning.			
CHW2 - Explore emerging insights and good practice locally with Abri to extend similar engagement and community support throughout Chard.	<ul style="list-style-type: none"> South Somerset DC Corporate Plan Abri Community Investment Plan 	<ul style="list-style-type: none"> South Somerset DC Abri RSL 	Extended whole community engagement providing greater access to support and encouragement to achieve.			
CHW3 - Draw on wider social mobility initiatives with strategic partners to develop a Chard focused pilot programme with local residents.	<ul style="list-style-type: none"> South Somerset DC Corporate Plan HotSW LEP Build Back Better 	<ul style="list-style-type: none"> South Somerset DC HotSW LEP 	Targeted local support and stimulus to break the cycle of poverty and underachievement.			
CHW4 - Introduce Chard Youth Achievement Awards to stimulate local role models and raise aspiration and potential. Categories could include sporting achievements, volunteer activity, young carer, young inventor, business ideas, arts and crafts, family chef/baker, technology etc.	<ul style="list-style-type: none"> Linked to Cross Cutting theme of Ways of Working and Place Leadership 	<ul style="list-style-type: none"> Local Partnership Chard Youth Centre Town Council Holyrood Academy 	Young people feel valued within the community, being recognised as positive role models in community life.			
CHW5 - Consider formation of local digital training hub – aligned with employment advice and integrated service access points.	<ul style="list-style-type: none"> Widening access to 	<ul style="list-style-type: none"> South Somerset DC Holyrood Academy Yeovil College 	Widen local access to vocational and adult training as well as academic routes.			
CHW6 - Co-ordinate and promote access to sports and recreation provision across the town so that pitches, facilities, and other infrastructure meet current and future needs of community/professional teams, and local residents and visitors. New investments should consider integrated facilities, green building standards, use of green infrastructure and sustainable urban drainage, amongst other design items. Future management models need to be considered as part of investment process.	<ul style="list-style-type: none"> South Somerset Local Plan Review South Somerset Leisure Facilities Strategy 2019 South Somerset Playing Pitch Strategy 2017 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Sports and recreational organisations 	Residents are active in sports and recreation leading to healthy lifestyles, community cohesion and social activities, with facilities linked through active travel.			



Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
CHW7 - Enhance and promote active travel routes and community development activities that support volunteering, skills development, cohesion and place management.	<ul style="list-style-type: none"> South Somerset Environment Strategy 2019 Somerset wide Climate Emergency Strategy Active Travel Route Assessment Chard Transport and Movement Appraisal (2019) Spark Somerset/ Primary Care Network projects 	<ul style="list-style-type: none"> South Somerset DC Somerset CC Spark Somerset 	More people are more active and able to chose safer walking and cycling routes into and around Chard.			
CHW8 - Encourage healthy eating through links to local agriculture and opportunities for community growing.	<ul style="list-style-type: none"> Somerset wide Climate Emergency Strategy 	<ul style="list-style-type: none"> South Somerset DC Spark Somerset Chard Connect Abri RSL 	Community routes also become growing and living corridors with improved awareness, well-being, civic pride and activity levels across all ages and social groupings.			
CHW9 - Explore further social prescribing to encourage active lifestyles and greater community cohesion and involvement. Opportunities may exist for community growing within housing areas and the town centre providing greater opportunities for inter-generation community-led action and shared learning through improved green infrastructure, local biodiversity projects, arts and culture and community action.	<ul style="list-style-type: none"> Spark Somerset/ Primary Care Network projects Abri Community Investment Plan 	<ul style="list-style-type: none"> South Somerset DC Spark Somerset Chard Connect Abri RSL Chard Town Council 	Residents across Chard have enhanced mental and physical health and well-being, leading to greater happiness and satisfaction levels.			
CHW10 - Work in partnership with others to facilitate expansion of local GP and community health services in the town centre to meet the needs of local growth.	<ul style="list-style-type: none"> South Somerset DC Local Plan growth objectives 	<ul style="list-style-type: none"> Somerset NHS Foundation Trust 	Easy community access to health support and advice – centrally located contributing to the town centre vitality.			
CHW11 - Work with partners to retain and enhance the quality and range of locally delivered primary, community and urgent health services focused within Chard and in line with population growth and local need.	<ul style="list-style-type: none"> South Somerset DC Local Plan growth objectives 	<ul style="list-style-type: none"> Somerset NHS Foundation Trust 	Continued access to locally based health services meeting the needs of the expanding population.			



Priority Theme 5: Town Centre Destination



Ambition for Chard - Outcome: Chard town centre will be a place that draws people to its culture, creativity and local amenities. An inspiration and enabler of community life.

Key measures - Outputs: More diverse uses and activities in the town centre with vacancy rate below national average. Increased footfall with visitors returning more frequently, spending more and staying longer. Varied nighttime economy appealing to wider range of community interests and ages. A safer visitor experience.

Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>TC1 - Maximise the benefits and relationship of a town centre located leisure centre with strong linked activity through physical improvements, joint marketing and promotional activity and an integrated signage strategy that extends the visitor experience, dwell and spend.</p>	<ul style="list-style-type: none"> South Somerset DC Council Plan Chard Regeneration Plan (2010) High Street Heritage Action Zone (HSHAZ) 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council 	Residents have equal access to physical activity that leads to a reduction in illness and enhanced lifestyles and outlook, with Chard town centre known for wellbeing and activity.			
<p>TC2 - Develop a leisure and well-being cluster approach as part of the new leisure centre attraction, specifically opportunities to cross market with complementary leisure/lifestyle/well-being businesses, meet the buyer events, trade fayres, partnering local surgeries on health referral programmes, linking in well-being trails and other initiatives.</p>	<ul style="list-style-type: none"> South Somerset DC Council Plan Chard Regeneration Plan (2010) HSHAZ 	<ul style="list-style-type: none"> South Somerset DC Proposed business network Primary care network Other town organisations 	Chard is known as a place for leisure and well-being with a strong cluster of lifestyle/well-being enterprises and strong partnering through a multi-agency approach.			
<p>TC3 - As an integral part of the cross-cutting priority "Ways of Working", there is need for Chard businesses to come together as part of a local business network. This should cover the whole business community as set out in (E3 above) but could also include a town centre focus sub-group of interests. Once mature, such a body could consider the feasibility of a Chard Business Improvement District (BID) which would provide an integrated action plan and a locally generated funding.</p>	<ul style="list-style-type: none"> Links with Priority E3 above Chard Regeneration Plan (2010) 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect Shadow business network partnership 	"Make it in Chard" is a known identity and a platform for local business to work collectively through on-line and place-based activity that promotes local quality, has local personality and is integrated.			
<p>TC4 - Maximise the benefit of completed Town Centre Public Realm improvements with the development of space activation plans such as street licenses, development / positioning / management of markets, street entertainment licenses and events/street activities. These being at:</p> <ul style="list-style-type: none"> Eastern gateway improvements The Guildhall area Holyrood Street Other complementary Heritage Action Zone initiatives 	<ul style="list-style-type: none"> South Somerset DC Council Plan Chard Regeneration Plan (2010) Chard Town Centre Public Realm Strategy (2019) HSHAZ 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council 	Chard's roads are streets that are appealing, functional, safe and distinctive, with natural places to gather for meeting, markets, events, activities and frame the heritage townscape of Chard.			



Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>TC5 - Develop relationships with strategic and local organisations and business networks as part of a meanwhile project for unoccupied properties. To work with targeted landlords in terms of partnering, tenancy agreements, insurances, other liabilities and to help provide a shell specification. To develop and wrap around the meanwhile project a “Make it in Chard” brand and experience that is coherent and local and is a progression to more permanent business starts ups and growth across the town centre.</p>	<ul style="list-style-type: none"> Chard Town Centre Public Realm Strategy (2019) HSHAZ 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect Young Somerset Project (Somerset CC) Abri RSL 	Chard is known as being open for business and opportunity with its town centre an enterprising destination that centres on “Make it in Chard”.			
<p>TC6 - Provide a retail mentoring scheme that supports existing and new businesses whether this be in a market setting, meanwhile space or within a leased building that addresses frontages, thresholds, window and indoor displays, point of sale, customer care, add value through high quality service and the role of digital merchandising and stock control.</p>	<ul style="list-style-type: none"> South Somerset DC Economic Strategy 2019 HSHAZ 	<ul style="list-style-type: none"> South Somerset DC Proposed business network 	Chard businesses work to a quality mark that is consistent and projects a warm welcome, quality products and services.			
<p>TC7 - Develop a markets and events programme that complements the “Make it in Chard” place brand, communications, marketing and enterprise support programme. It needs to add value and not compete with existing independent businesses but build a cluster approach to local products, goods, services that form part of a cross-marketing campaign. Events should form part of a co-ordinated calendar approach with public buildings and spaces forming part of town events and festivals across the year.</p>	<ul style="list-style-type: none"> Chard Town Council management/activity plan 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect Chard Carnival and other town organisations 	Chard’s rural location and setting is known through a year-round calendar that evokes community, pride, sense of place and the “Make it in Chard” story.			
<p>TC8 - Develop a broader and more distinctive night time economy that appeals to local residents and visitors through a co-ordinated approach to streetscape, property improvements, business support, engaging with the “Make it in Chard” brand and the proposed meanwhile project.</p> <p>In addition to supporting established food and drink/evening time businesses other activity could include:</p> <ul style="list-style-type: none"> Pop up cinema/theatre/mic nights Night markets Supper clubs Food producer/taster events Heritage trails by night Arts/crafts – make a lantern <p>Where required improvements in street lighting and other measures will be introduced.</p>	<ul style="list-style-type: none"> Culturally Chard HSHAZ Cultural Programme 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect Proposed business network 	A night out in Chard has a broad offer through physical businesses, events and activities that draw in local people and visitors. Culture, arts, heritage, food and drink and other activities are celebrated with the town centre feeling safe to explore, meet up and enjoy.			



Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>TC9 - Consider and agree arrival management for visitors into the town centre that provides the landing point and orientates people on a legible circuit engaging with the main town attractions, spaces and activities through people friendly streets and paths.</p> <p>This has been identified at the Crowshute edge of the town centre so that it brings visitors in at the top end of the town centre.</p>	<ul style="list-style-type: none"> Chard Regeneration Plan (2010) Chard Town Centre Public Realm Strategy (2019) HSHAZ 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council 	Visitors enjoy a day out in Chard that allows them to explore, dwell, sample town life, contribute to the local economy, and highly rate the town experience.			
<p>TC10 - Implement the Town centre parking recommendations within the Transport and Movement Appraisal to reduce the dominance of cars on streets and spaces. Opportunities to consider include:</p> <ul style="list-style-type: none"> increase off-street parking management of on-street parking to increase footways and public space disabled parking provision signage improvements junction improvements charging strategies and payment methods electric vehicle charging and coach parking 	<ul style="list-style-type: none"> Chard Regeneration Plan (2010) Chard Town Centre Public Realm Strategy (2019) HSHAZ Chard Transport and Movement Appraisal (2019) 	<ul style="list-style-type: none"> South Somerset DC 	The town centre benefits from improved accessibility and clarity of vehicle parking linked to pedestrian movement to the main attractions and destinations in the town. The town centre promotes sustainable transport, welcoming those with EV's and increased visitor numbers and dwell time in the town.			
<p>TC11 - Explore the feasibility of a central community hub building that is a multi-use facility that links into enterprise, arts/culture, heritage, venue space, supports the "Make it in Chard" story and activities.</p> <p>Depending on building/site, residential use could be incorporated to create a micro neighbourhood.</p> <p>Possible locations include:</p> <ul style="list-style-type: none"> The Boden Centre The Lace Mill building Land alongside Crowshute Centre Land to rear of Town Museum <p>A feasibility study and options appraisal would focus on understanding current provision, demand, potential buildings/sites, costs, management and delivery, amongst other items and would inform future capital funding bid.</p>	<ul style="list-style-type: none"> Work Hub Feasibility Study 2021 Links with Priority Aims E2 and E8 above 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Chard Connect Chard Town Museum 	Chard Hub is the place to access and engage in community life and a springboard to other activity across the town, as well as being a home to Chard's heritage, adult/ community learning, enterprise support, workspace and more.			
<p>TC12 - Develop and implement a stronger town centre walking circuit that encompasses recreation, sports, parks and open spaces with legible links to and from the town centre as well as promotional campaigns for sports and events fixtures as well as informal recreation and outdoor well-being activities.</p>	<ul style="list-style-type: none"> Chard Regeneration Plan (2010) Chard Transport and Movement Appraisal (2019) Chard Town Centre Public Realm Strategy (2019) HSHAZ 	<ul style="list-style-type: none"> South Somerset DC Chard Town Council Respective recreation and sports organisations 	Visitors enjoy a day out in Chard and area that allows them to explore, dwell, sample town life, contribute to the local economy, and highly rate the town experience.			



Priority Theme 4: Housing & Connectivity

Ambition for Chard - Outcome: Chard will fulfill its growth objective, creating a sustainable, connected and joined-up community benefitting the whole of Chard. Chard will also be easy to get to, easy to move around and to access the green community spaces and open countryside.

Key measures - Outputs: Delivery of planned new housing across Chard by the development industry. Provision of active travel routes and corridors and other local safety improvements. Reduced town centre traffic and delivery of a range of alternative sustainable transport options for local travel.

Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p>HC1 - Produce a Local Cycling and Walking Investment Plan (LCWIP) for Chard and develop an active travel network across the town that is integrated, demand driven and embraces cross cutting policies and practices. This should be more than just routes but also respond to and incorporate other opportunities in terms of accessibility, travel to school and work initiatives, green infrastructure, biodiversity, community growing corridors, linkages into public transport and more.</p>	<ul style="list-style-type: none"> Active Travel Route Assessment Chard Transport and Movement Appraisal 2019 Links to Priority Theme 4 	<ul style="list-style-type: none"> South Somerset DC Somerset CC 	Connects the whole of Chard with the core service function of the town centre – making it the primary destination choice. Supports healthy lifestyles making walking and cycling the more convenient option of choice.			
<p>HC2 - Review, develop and design proposals for the A358 that forms part of a wider highway network appraisal, but specifically to identify opportunities to improve the walking and cycling experience for residents, with the aim to identify where roads can become streets, with increased footway widths, crossing points, DDA improvements, cycle infrastructure and integrated signage. These should link into the active travel network proposals.</p>	<ul style="list-style-type: none"> Chard Regeneration Plan (2010) Active Travel Route Assessment Chard Transport and Movement Appraisal (2019) 	<ul style="list-style-type: none"> South Somerset DC Somerset CC 	A safer and more attractive environment for residents and visitors, encouraging more local walking and cycling trips, and a reduction in carbon emissions.			
<p>HC3 - Develop and implement cross town centre linkages as identified in the Movement and Transport Appraisal that looks to enhance walking and cycling opportunities in terms of footway widths, crossing provision, more legible paths and routes, improved bus stop provision (shelters, real time information/timetables) links with the National Cycle Route 33. Specific areas of focus include:</p> <ul style="list-style-type: none"> Boden Street – Holyrood Lace Mill and Fore Street links Holyrood Street/Fore Street junction Crowshute Link crossing improvement Fore Street crossing provision Links out to Jocelyn Park/Millfield 	<ul style="list-style-type: none"> Chard Regeneration Plan (2010) Chard Transport and Movement Appraisal (2019) Somerset Active Travel Strategy 	<ul style="list-style-type: none"> South Somerset DC Somerset CC Sustrans 	Residents and visitors are confident in walking and cycling through legible, continuous, and integrated paths, trails and routes that connect neighbourhoods with the town centre.			
<p>HC4 - Develop the Stop Line route (Sustrans Route 33) and seek ways to improve its legibility through the town for local residents and visitors as a primary walking and cycling route with improvements at road junctions and through Millfield Industrial Estate onwards to Tatworth. The Stop Line becomes part of the Chard offer with businesses aligning walking and cycling products and services.</p>	<ul style="list-style-type: none"> Sustrans NCR 33 Somerset Active Travel Strategy 	<ul style="list-style-type: none"> South Somerset DC Somerset CC Sustrans 	Chard is known for walking and cycling whether on long regional routes, day rides and for residents accessing their town and rural area.			



Project	Policy Alignment	Lead Organisations	Outcomes	Timeline		
				Short	Medium	Long
HC5 - Explore, develop and implement green transport infrastructure improvements through upgrades in low emission buses, cycle friendly buses and provision of electric vehicle charging points at strategic locations in the town.	<ul style="list-style-type: none"> Somerset Bus Strategy 	<ul style="list-style-type: none"> South Somerset DC Somerset CC Bus operators 	The town has strong green credentials with public transport being accessible to all, and support for electric vehicle charging at key locations.			
HC6 - Explore potential for innovative solutions to retain local spending and connectivity through, for example, e-cargo bikes as part of e-commerce and carbon-neutral last-mile delivery service. This would help with the barrier of return trips to home for some residents that wish to walk. This could be operated by a local social enterprise and involve young people.	<ul style="list-style-type: none"> Somerset Active Travel Strategy 	<ul style="list-style-type: none"> South Somerset DC Somerset CC Sustrans Local community organisations 	The town has strong green credentials embracing technology, reducing carbon miles and promoting short supply chains and deliveries.			
HC7 - Re-engage the wider community with the plans for housing growth and clarify delivery proposals. Consider whether alternative forward funding solutions are required to advance infrastructure provision with a Chard-wide benefit and overcome concerns.	<ul style="list-style-type: none"> South Somerset Local Plan Review 	<ul style="list-style-type: none"> South Somerset DC 	Community confidence in delivery of growth and local social and economic benefits.			



Future Chard Strategy

Social and Economic Baseline Report Technical Document

Draft 11th August 2021

Context

Chard is a market town in South Somerset, located in the Heart of the South West LEP and the South West region of England. It has a population of 14,000 residents and contains over 400 businesses providing around 5,000 jobs. The town is surrounded by countryside and is in close proximity to the Blackdown Hills AONB to the West and North, providing a key natural asset for residents and visitors. The town does not have a train station but is closely linked to the regional trunk road network with rail services available from nearby Crewkerne and at Axminster across the Devon border.

The town's economy has historically developed across two main areas – its manufacturing base outside the town centre, and the retail, hospitality and leisure offer in the town centre. The Chard economy is highly dependent on manufacturing, accounting for nearly half of all local jobs - 6 times higher than the average in England.

The dependence on the sector has caused Chard's economy to be vulnerable to closures, which has now come to the fore with the closure of the Oscar Mayer food processing site, resulting in an estimated loss of 800 jobs (15% of all jobs in Chard). Even before this closure, manufacturing employment has been declining in recent years despite continued expansion of the other major employer Numatic International – the home of Henry vacuum cleaner. Town centre activity appears to have been sustained prior to the Covid-19 pandemic, with employment growth in both the retail and hospitality sector in recent years although this will need careful monitoring as the economy re-opens.

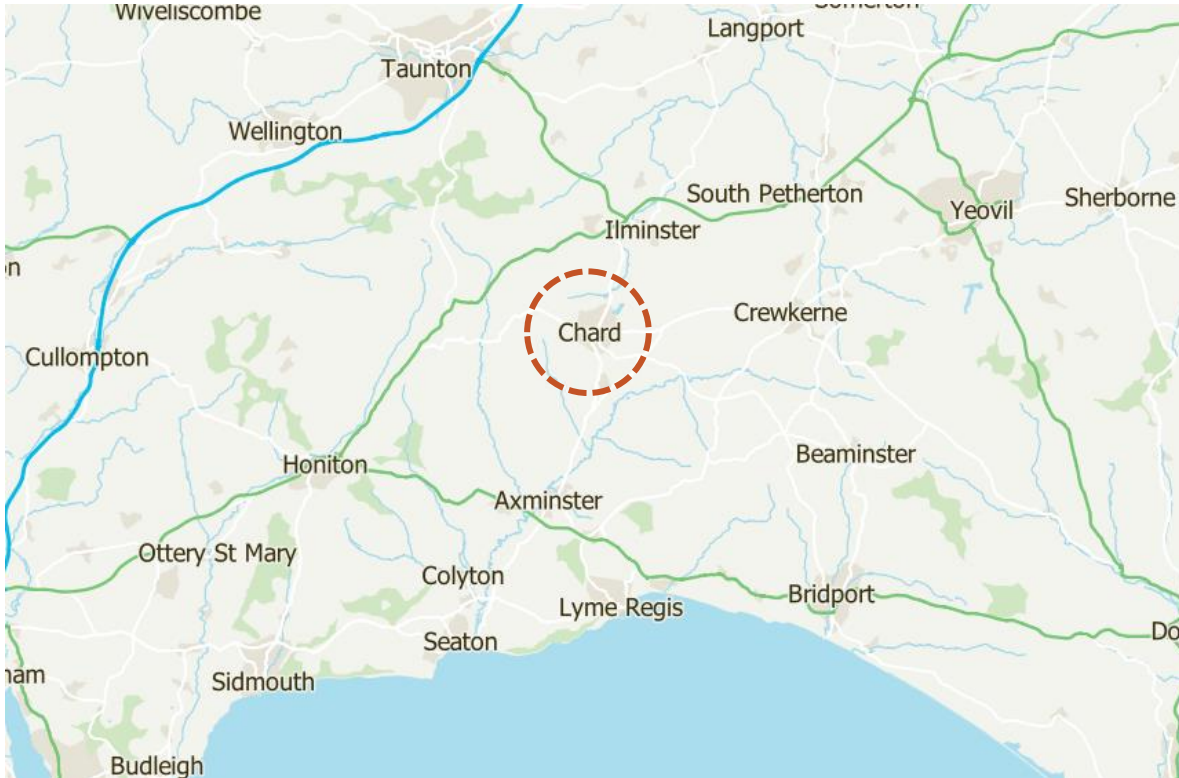
Whilst the strength of the economy has helped maintain high levels of employment activity locally, the dominance of relatively low paid manufacturing employment and other activities tends to constrain the local labour market, with low levels of economic activity, a limited skills base and low-level incomes leading to low social mobility of the population generally.

Context Map

Chard Local Area



Chard Wider Context



Source: Alex Quattrone
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Purpose of this report

The social and economic baseline report provides an independent and robust analysis of the challenges and opportunities facing Chard today. It uses the latest publicly available data to better understand Chard in terms of its people, economy, and place. This process of analysis and reflection has been tested, explored, and interrogated through local community and stakeholder engagement and has informed the strategy development.

Several issues and opportunities have been highlighted from the social and economic analysis, centered around six key challenges outlined below. Better understanding these challenges and how they can be targeted in the Future Chard strategy will be required to ensure growth and regeneration improves the prosperity of residents living in Chard.

Key Challenges for Chard

C1: Deliver economic opportunities for a constrained labour market	Page 5
C2: Reverse the decline in the economy	Page 9
C3: Diversify the economy and support new sectors	Page 12
C4: Tackle unequal deprivation and low social mobility across Chard	Page 15
C5: Attract more people to live and work in Chard	Page 17
C6: Enhance the town centre role and quality offer	Page 19

Appendix 1 – Deprivation Maps & Description

Appendix 2 – Chard Wards Socio-Economic Profiles

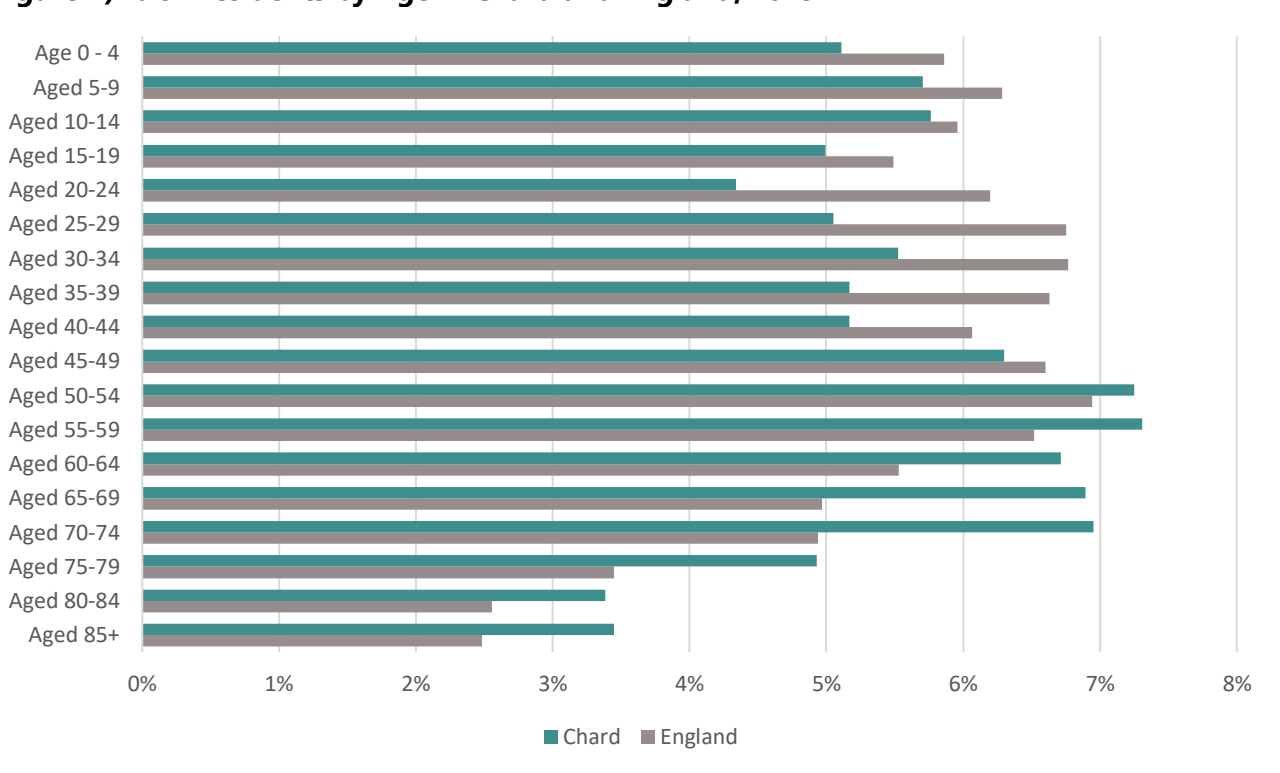
Challenge 1: Deliver economy opportunities for a constrained labour market...

High proportion of residents over the working age...

There were around **13,900** residents living in Chard in 2019, a +3% increase (+300 residents) in the last five years. Around **1 in 4** residents are over the usual working age of 65, higher than the average of **1 in 5** residents in England but similar to the average in South Somerset and Somerset County. Chard also has higher rates of all age groups above the age of **+50 years** compared to England.

A higher proportion of residents over the working age creates challenges, due to lower levels of economic activity and a smaller labour force. It poses a challenge of how future growth and investment can provide benefits to older residents, particularly in terms of volunteering, health, and wellbeing.

Figure 1) % of Residents by Age in Chard and England, 2019



Source: ONS, Population estimates - small area based by single year of age, 2014 – 2019. Accessed via NOMIS [here](#).

Looking at areas within Chard, there are clear differences in age distributions. For example, Avishayes ward has a generally younger population with the highest concentration of children under 15 years (21.4%), whilst Combe is predominantly older (29% over age 65 and 50.2% over age 50).

Table 1) % Population by age by Ward Area

Age Range	Avishayes	Combe	Crimchard	Holyrood	Jocelyn	Chard
0-15 years	21.4%	15.2%	19.4%	18.2%	17.6%	18.5%
16-24 years	10.0%	7.8%	7.6%	9.8%	7.2%	8.6%
25-49 years	30.2%	26.8%	28.2%	29.7%	28.4%	28.8%
50 – 64 years	19.1%	21.4%	21.8%	18.4%	21.4%	20.3%
Aged 65+	19.3%	28.9%	23.0%	23.8%	25.4%	23.8%

Source: ONS, Population estimates - small area – 2019. Accessed via NOMIS [here](#).

Low levels of economic activity...

Data on economic activity is only available at the local authority level but provides an indication of trends at the local level. In addition to a lower proportion of residents who are working age (16 to 65 years old) in South Somerset they are less likely to be economically active (i.e. in employment or unemployed but able to work). In South Somerset around **1 in 4 working age residents are economically inactive**, higher than the rate of around **1 in 5 residents** in the Heart of the South West LEP and England. Amongst those that are economically inactive, **90%** of residents do not want a job (including those who have retired), higher than **75%** in HOTSWS LEP and **77%** in England.

Anecdotally, the local Chard situation is far better than this with a traditionally strong local employment base there has generally been a high level of economic activity and near full employment; albeit concentrated in lower value / lower paid work. The traditional availability of local jobs is, of course, beginning to be challenged with the recent loss of over 800 jobs at the Oscar Mayer plant in the town, although South Somerset District Council and partners have established a local task force response to assist those at risk of losing their job to find alternative work and further training to prepare them for the future.

Table 2) Economic Activity Rate, 2020

	South Somerset	Somerset	HOTSWS	South West Region	England
Economic activity rate (aged 16-64)	76%	80% ▲	80% ▲	81% ▲	80% ▲
% who are economically inactive (aged 16-64)	24%	20% ▼	20% ▼	19% ▼	21% ▼
% of economically inactive who want a job	8%	20% ▲	25% ▲	25% ▲	23% ▲
% of economically inactive who do not want a job	92%	80% ▼	75% ▼	76% ▼	77% ▼

Source: ONS Annual Population Survey, 2020. Accessed [here](#).

Low level skills base...

Like economic activity, data on skills levels is available at the local authority level. In South Somerset, there is a higher proportion of residents with no qualifications (8%) and a lower proportion with level 4 qualifications (degree level and above) (26%). This reflects other evidence available at the Chard level, such as a high proportion of employment in sectors that do not require level 4 qualifications (e.g. manufacturing, hospitality and retail) and areas of Chard falling in the top 20% deprived for education and skills.

Table 3) Qualification Levels, 2020

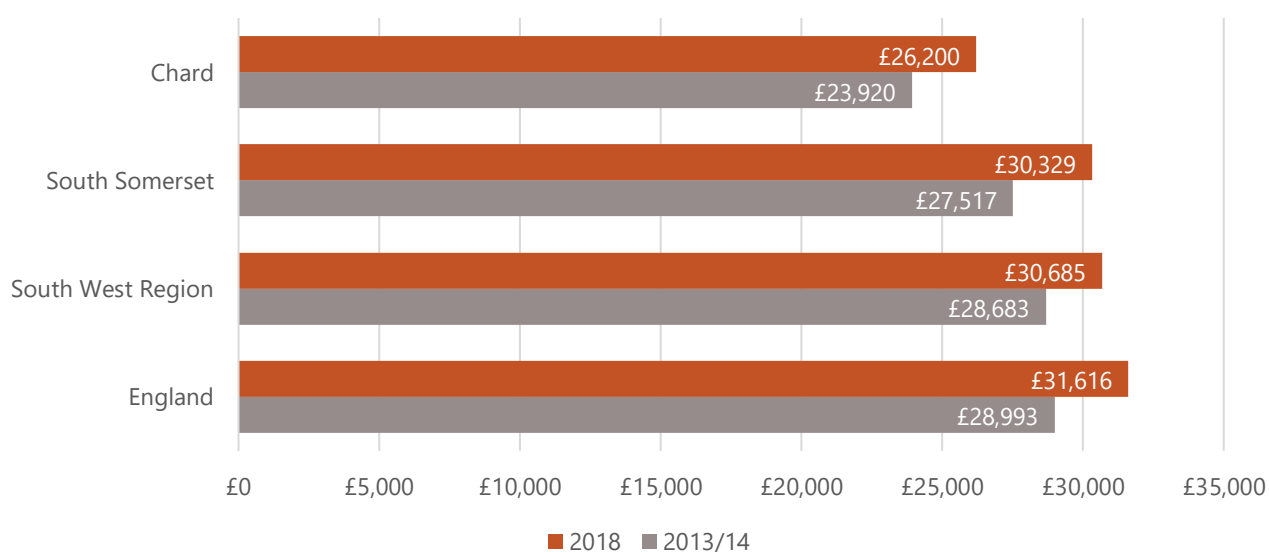
	South Somerset	Somerset	HOTSW	South West Region	England
Level 4	26%	35% ▲	37% ▲	41% ▲	43% ▲
Level 3	49%	57% ▲	60% ▲	62% ▲	61% ▲
Level 2	71%	76% ▲	78% ▲	80% ▲	78% ▲
Level 1	86%	88% ▲	90% ▲	90% ▲	88% ▲
Other qualifications	6%	6% ►	5% ▼	5% ▼	6% ►
No Qualifications	8%	7% ▼	6% ▼	5% ▼	6% ►

Source: ONS Annual Population Survey, 2020. Accessed [here](#).

Low levels of income...

Average household incomes in Chard are around **£26,200**, 14% lower than the average for South Somerset (**£30,300**), 15% less than South West Region (**£30,685**) and 17% below England (**£31,600**). There has been a consistent pattern of lower local incomes over the past five years as highlighted in Figure 2 below.

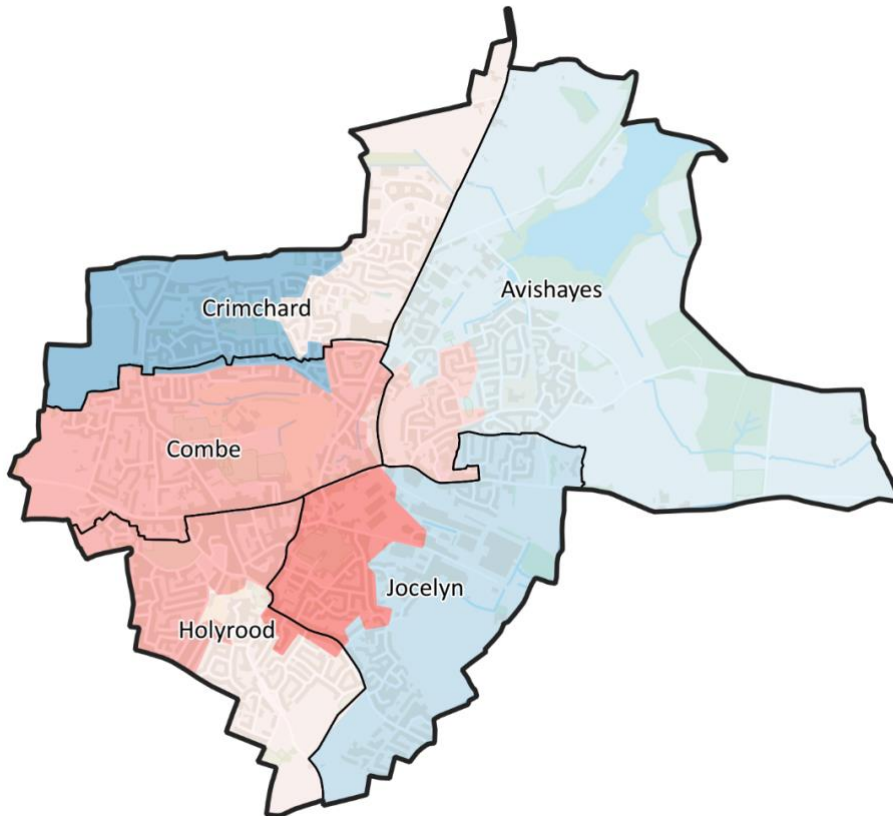
Figure 2) Average Household Income, 2013/14 to 2018



Source: ONS, ONS Small Area Income Estimates, 2014 to 2018. Accessed [here](#).

According to deprivation data in the map overleaf (Figure 3), income deprivation is a particular issue in the west of Jocelyn ward near the town centre, north of Hollyrood near the town centre and in the ward of Combe. Low incomes reflect the sector mix in Chard, with a high proportion of lower paid jobs such as manufacturing, retail and hospitality. It also demonstrates a lack of opportunity for residents to access higher paid jobs, necessary for social mobility and improving prosperity.

Figure 3) Income Deprivation, 2019



Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).

< Most deprived **1** **2** **3** **4** **5** **6** **7** **8** **9** **10** Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#)

Challenge 1 Opportunities:

- Consider investment in the Voluntary, Community, and Social Enterprise (VCSE) sector to help bridge the gap for some people between unemployment and employment.
- Seek opportunities for older age residents to contribute to community facilities and local activities through volunteering and engagement with local organisations.
- Find ways to deliver vocational training, work-based skills and adult education locally through greater use of flexible digital learning. This can support those with a lower-level skills base who may also rely on poor public transport services to transition to other types of employment.
- Maximise apprenticeship and local employment opportunities during construction of new development and regeneration sites to provide opportunities for residents to access new skills.

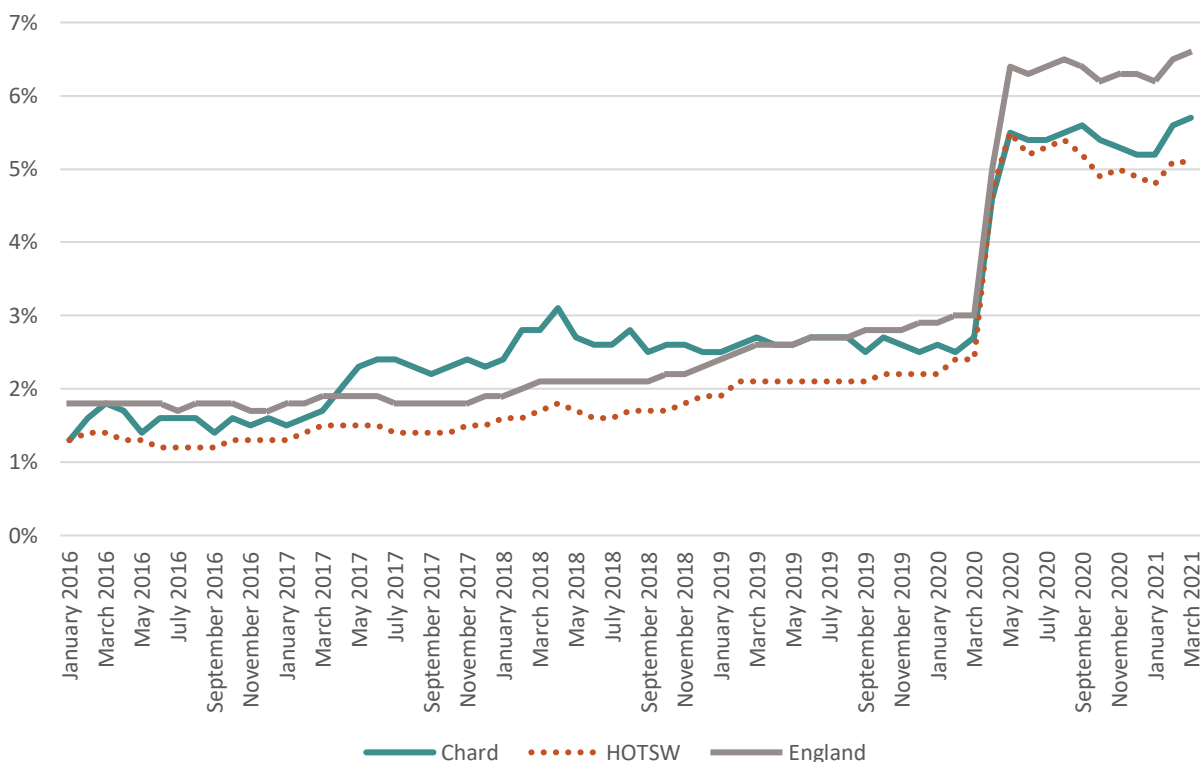
Challenge 2: Reverse the decline in the economy...

COVID has increased unemployment...

The proportion of residents claiming unemployment benefits in Chard was around **5.7%** in March 2021, slightly higher than the average for the Heart of the South West LEP area (**5.1%**) but lower than England (**6.6%**). Like many areas in the UK, unemployment in Chard has nearly doubled since the start of the COVID pandemic from **2.7%** in March 2020 to **5.7%** in March 2021. The rate of unemployment has, though, remained stable since the first lockdown in March 2020, with some fluctuations in line with successive lockdowns, placing restrictions on business operations.

There is a high risk that unemployment could rise in the Autumn of 2021 once the government’s furlough scheme comes to an end. The bank of England has estimated an increase in unemployment of around **+0.7%** nationwide, despite restrictions lifting¹. Applying this to the Chard figure would suggest local unemployment could rise to between 6% and 7% of all adults. People typically most at risk of losing their jobs or failing to enter the labour market are younger age groups. Elsewhere in the UK there is a growing trend of young adults choosing to stay in education due to a lack of opportunity in the job market. Given the lack of locally based FE training in Chard this is not as straight forward an option for many young people in the town who need to travel out to either Yeovil, Taunton or Bridgwater by public transport.

Figure 4) % Working Age Residents Claiming Benefits, 2016 to 2021



Source: ONS, Claimant Count, 2020. Accessed via NOMIS [here](#).

¹ <https://www.bbc.co.uk/news/business-52660591>

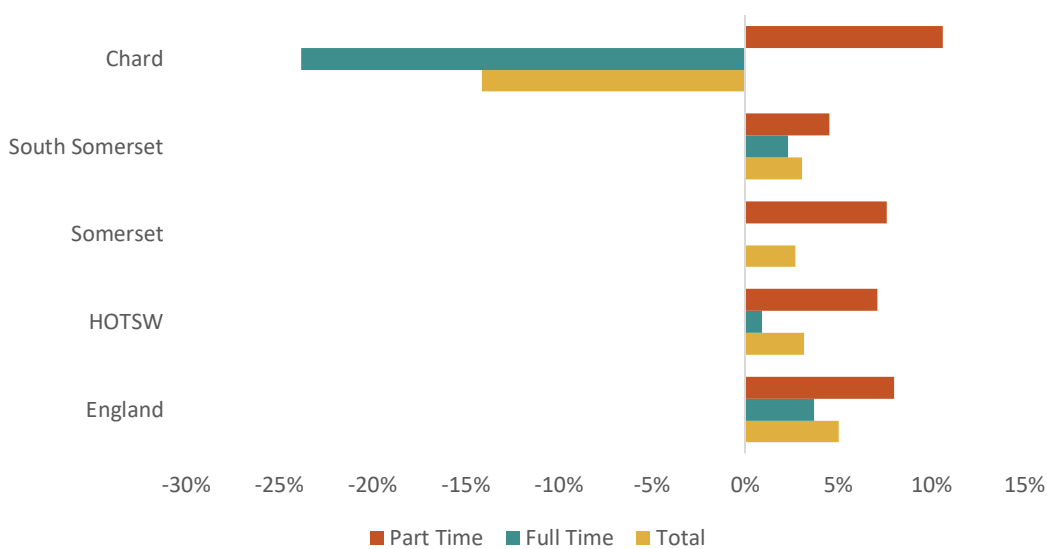
Employment was declining pre-covid...

Employment in Chard was declining in the years before the COVID pandemic, and we still await the release of more recent data to show how Covid affected local jobs. In 2019, however, there were some **5,025** people employed in Chard, a decline of **-825 total jobs (-14%)** compared to 2014. This is despite **+3%** growth in employment in South Somerset and HOTSW LEP, and **+5%** in England. This could be reflected in unemployment rates locally, with the proportion of residents claiming unemployment benefits increasing from just over **1%** in January 2016 to **2.5%** unemployed in March 2020. Although this change is in line with the national trend, and could have been impacted by macro-economic impacts, such as Brexit.

Of particular concern is the fall in **full time jobs** which have declined by **-24%**, whereas **part time jobs** increased by +11% between 2014 and 2015. This indicates considerable transition in the economy and will have further impact on overall household incomes.

The planned closure of **Oscar Mayer**² in the Chard Holyrood ward scheduled for September 2021 will add to this trend of decline, with an estimated loss of **-800 jobs**, around **16%** of all jobs in Chard. The redundancy task force has been launched to find employment for those whose jobs are at risk from the closure of Oscar Mayer. It is important to note that employees working at Oscar Mayer will have skills levels at around NVQ Level 2 and Level 3, suited to skilled trade occupations and process, plant and machine operative occupations, although it is understood there may still be language barriers for many of the employees to easily transition to other employers. Some capacity is understood to be emerging through further expansion at Numatic International in Chard, but others will face the challenge of looking further afield for employment with the added complication of poor public transport and accessibility without access to private cars.

Figure 5) % Change in Employee jobs by Type, 2014 – 2019 (Full-Time/Part-Time & Total Jobs)



Source: ONS, Business Register Employment Survey, 2019. Accessed via NOMIS [here](#).

Note – Full-Time jobs in Somerset increased by 1% over the period but fails to register on the graph due to the scale.

² <https://www.oscarmayer.co.uk/chard-update/>

Challenge 2 Opportunities:

- Work with employers across Chard to connect those at risk of unemployment from the Oscar Mayer closure to find new employment.
- Establish local employment contracts within the Chard Regeneration programmes and with developers of the urban expansion sites.
- Facilitate local residents to access other employment opportunities.
- Nurture business startups by providing workspace and supporting infrastructure.
- Support businesses to reopen and deliver public realm improvements and events to stimulate footfall in the town centre to safeguard local employment.

Challenge 3: Diversify the economy and support new sectors...

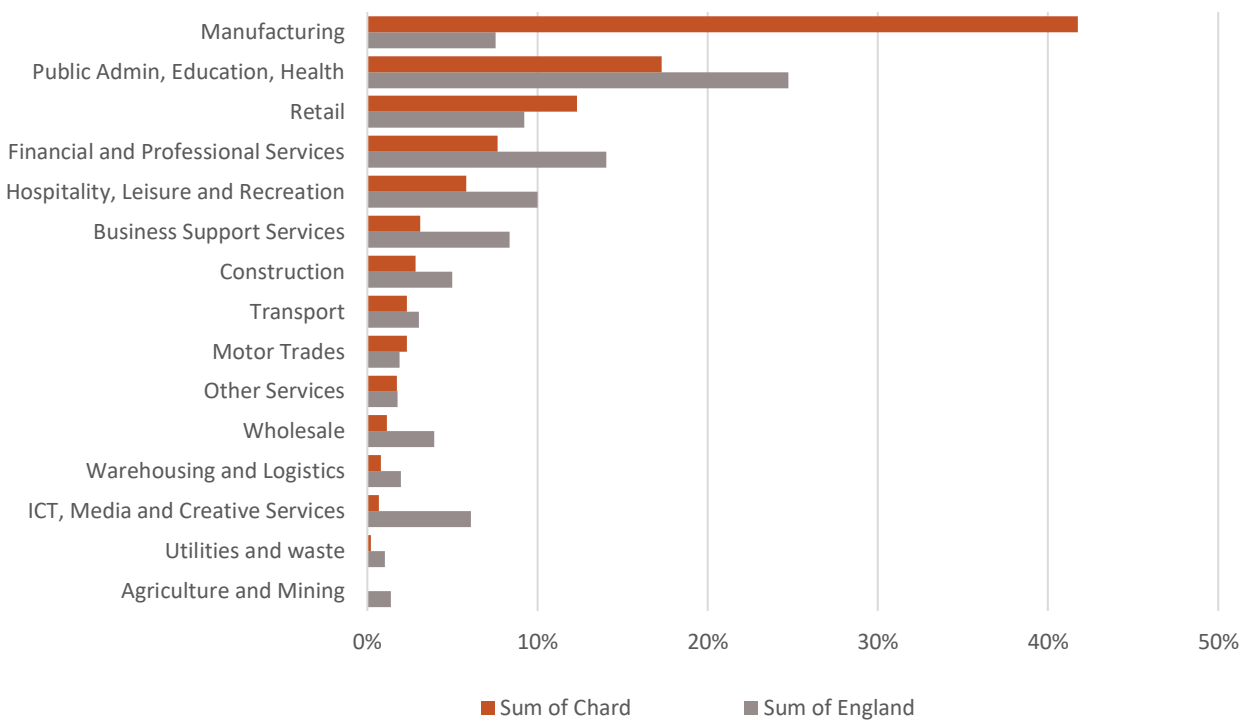
High dependence on manufacturing sector...

Manufacturing is the largest sector in Chard, with an estimated **2,150 jobs** in 2019. This accounts for **43%** of jobs and is nearly **6 times** higher than the proportion of jobs in England. Manufacturing employment is split equally between Millfield Industrial Estate in Jocelyn Ward and the Oscar Mayer site in Crimchard Ward.

The public sector (**890 jobs**) and retail (**630 jobs**) are the next two biggest sectors, accounting for **18%** and **13%** of employment respectively. Chard is underrepresented in several higher value sectors compared to the England average, including ICT, Media and Creative services and financial and professional services.

The high dependence on the manufacturing sector means the economy is less resilient to shocks, such as the Oscar Mayer site closure which is cutting the manufacturing employment base in half. The result is high levels of skills and occupational lock-in from residents, making it more difficult to transition to other jobs and sectors.

Figure 6) % of Total Employment in Chard by Sector, 2019



Source: ONS, Business Register Employment Survey, 2019. Accessed via NOMIS [here](#).

Low number of specialised and growing sectors...

The economy currently has few sectors which are specialised and growing, considered as fundamental to the economic distinctiveness and growth of Chard in the future. The chart on page 14 shows the breakdown of Chard’s economy by employment sector, identifying specialisation compared to England, proportional growth over the last five years, and the total size of the sector.

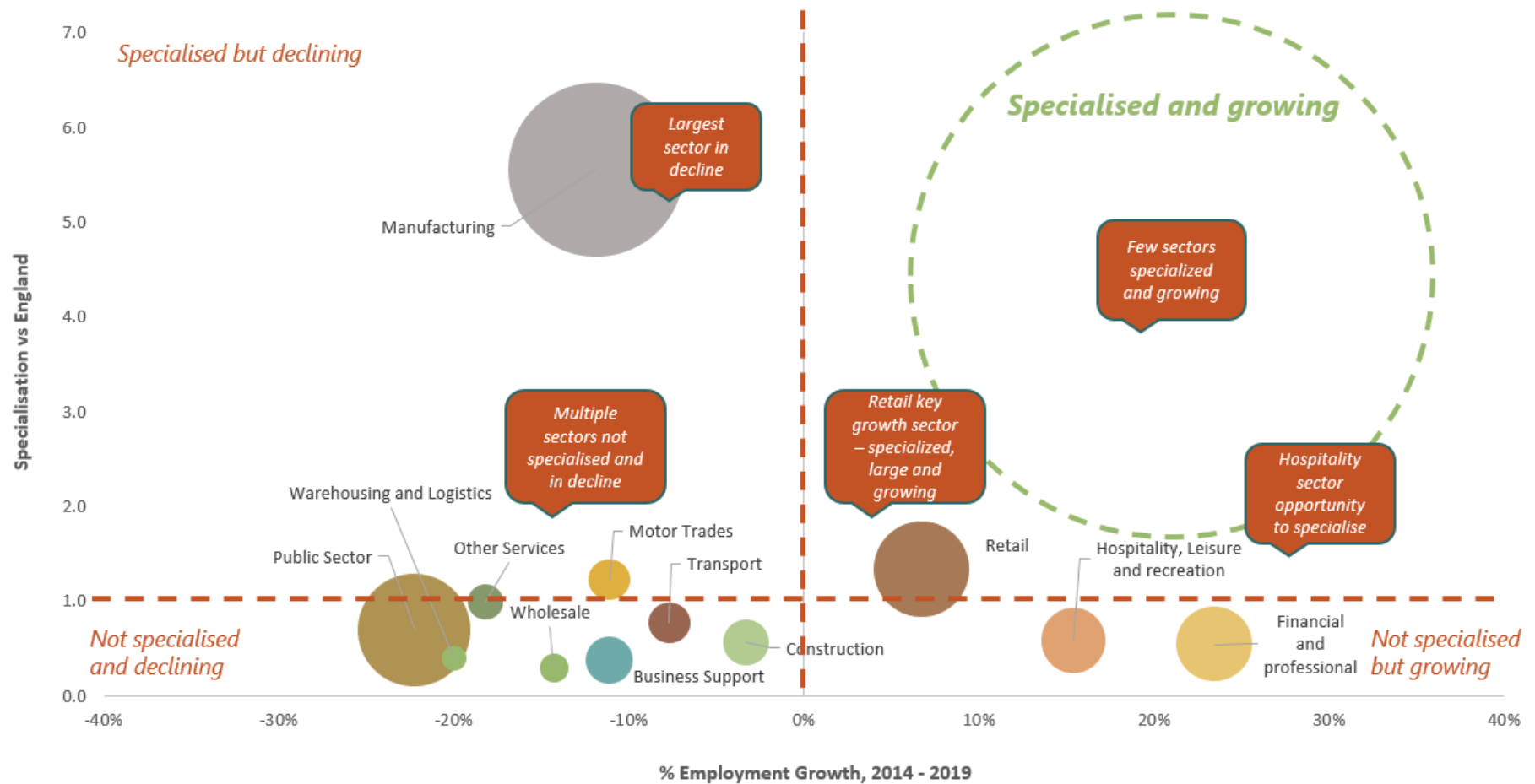
Analysis of the chart overleaf identifies a number of key trends:

- **Manufacturing** is the largest sector but has been in decline and will lose further jobs in 2021.
- Multiple sectors have seen employment losses in recent years, including the **public sector, construction, motor trades, wholesale, business support and warehousing and logistics.**
- **Retail** is a key growth sector in chard, as it is more **1.3 times** more specialized than the average in England, is the third largest sector (**c. 600 jobs**) and has grown by around **+8%** in recent years.
- The **hospitality and leisure sector** has grown by around **+15%** in recent years but is not yet specialised. There is an opportunity to increase employment in this sector, so it accounts for a greater proportion of jobs locally and contributes to the distinctiveness and offer of the town centre.
- The **financial and professional sector** is the highest growing sector, with an increase of **+22%** jobs in recent years. This is a key sector that could benefit from an increase in workspace provision, particularly given the high number of sole traders operating in this field.

Challenge 3 Opportunities:

- Continue to support the manufacturing sector whilst diversifying the local economy.
- Delivery of affordable workspace and infrastructure for creative start-ups and resident entrepreneurs where there is understood to be potential in the wider rural area.
- Deliver this by leveraging value from new developments, including the use of S106 and affordable workspace policies.

Figure 7) Chard Sector Breakdown: Sector Size, Specialisation and Growth, 2014 – 2019



Specialisation: the proportion of total employment vs the average proportion in England. A score above 1 is more specialised (i.e. score of 2 is 2 times more specialised)
Growth: % employment growth between 2014 and 2019
Size of bubble: total employment in sector

Source: ONS, Business Register Employment Survey, 2019. Accessed via NOMIS [here](#).

Challenge 4: Tackle unequal deprivation and low social mobility across Chard...

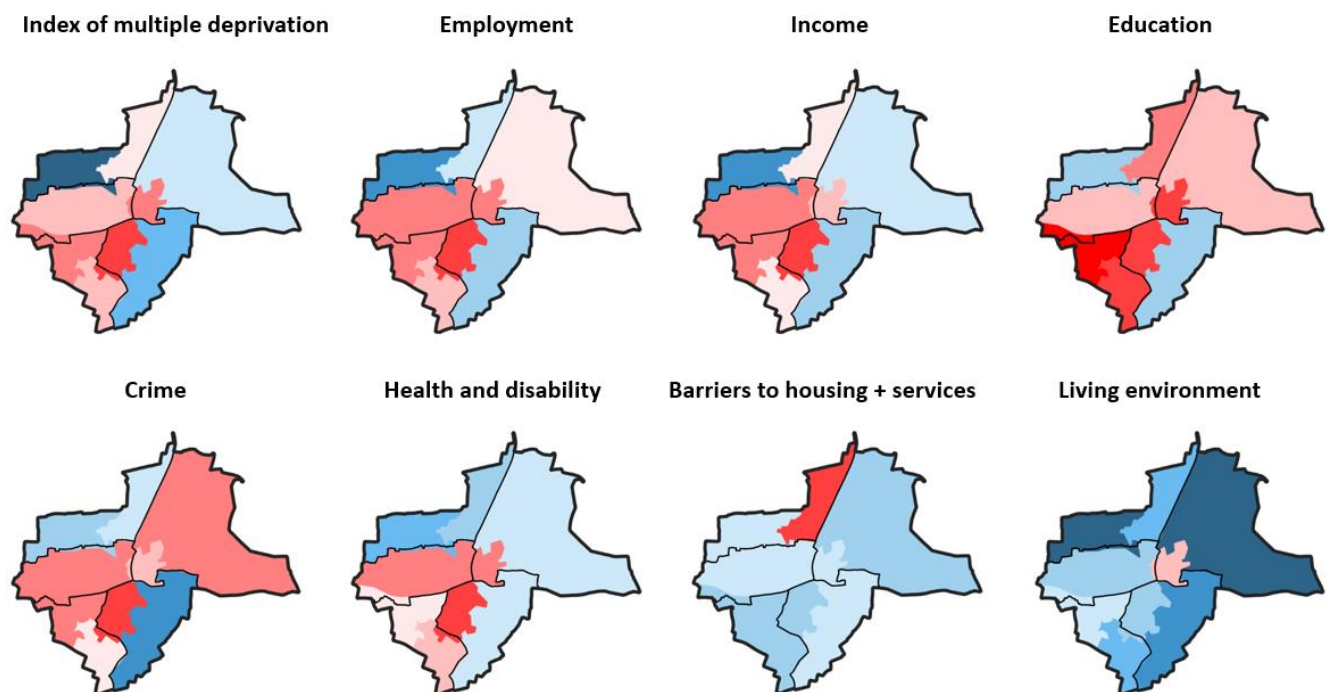
There are serious pockets of deprivation in Chard...

The prosperity and life opportunities of residents living in Chard is unequal, with large differences in deprivation levels found across the town. The maps below show the different domains of deprivation by small geographical areas (Lower Super Output Areas), as provided by the ONS. The indices of multiple deprivation (IMD) cannot be aggregated to the local ward levels, but the maps have been presented with the ward boundaries for easy comparison. Further explanation of the national IMD data is set out in Appendix 1.

Analysis highlights of deprivation maps highlights several key trends:

- The town centre area west of the **Jocelyn Ward** falls within the **top 20%** most deprived across **all domains**, excluding barriers to housing and services and living environment.
- The west area of the Holyrood Ward falls within the **top 10%** most deprived for **education and skills** deprivation, whilst the east area falls within the **top 20%** most deprived, reflecting low skills attainment and lack of opportunity for residents.
- The northeast area of the **Crimchard Ward** falls within the **top 10%** deprived for **barriers to housing and servicing**, reflecting issues relating to affordability and homelessness.
- **Employment, education, and crime** deprivation are the greatest issues across the whole town area when compared to other domains.

Figure 8) Indices of Deprivation, 2019



Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).

< Most deprived **1** **2** **3** **4** **5** **6** **7** **8** **9** **10** Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#).

Persistent low incomes, poor skills and occupations constrain life chances ...

It is widely recognised that good education and good quality jobs are crucial in 'getting ahead' and yet many individuals across Chard are potentially held back by a complex set of often inter-related factors such as low household income, housing, ill-health or disability and poor transport and digital communications.

According to the UK's Social Mobility Commission (2018) relative occupational mobility has changed little over the last five years nationally: those from better off backgrounds are almost 80 per cent more likely to land a top job than their working-class peers. Furthermore, at 34 per cent, the share of working-class people in professional occupations in 2018 was only a little higher than it was 2014 (32 per cent) despite the increased number of jobs available at this level.

Social mobility is fundamentally about ensuring that a person's occupation and income are not tied to where they start in life: "it is about fairness across society and ensuring that people of all backgrounds get equal opportunities and choices in early years, at school, in further education, in universities and at work". ([Social Mobility Commission](#), 2019).

It is difficult to determine the real picture within Chard due to limited local area data. The National [Social Mobility Index](#) (2020) places South Somerset in the bottom 30-40% of all 324 local authority areas across England. Given the evidence from IMD for Chard highlighted earlier, it is likely Chard will be significantly worse than this overall district performance. The key factors addressed in the index include:

- Early Years – including % of nursery providers rated outstanding or good by Ofsted
- School Years – rating standard of local schools and achievements at Key Stage 2 and GCSE
- Youth - % of school leavers not in education, employment or training and progress to A' level and Higher Education
- Adulthood – median weekly earnings, average house prices relative to earnings, % of local managerial and professional occupations, % of families with children who own their own home.

Challenge 4 Opportunities:

- Tackle a wide range of deprivation issues and level up the town centre in relation to other areas.
- Engage with individuals within the community to encourage and foster sense of local inclusion providing targeted support and signposting to further help.
- Facilitate greater local access to support and training, including adult education
- Broaden the local employment base and develop new enterprise start-ups and social enterprise vehicles as alternative to traditional employment expectations.
- Increase linkages between developers, employers and FE colleges to increase skills and employment opportunities for residents.

Challenge 5: Attract more people to live and work in Chard...

Housing is more affordable than the average in Somerset...

According to ONS data, the average price of a property in Chard is around **£185,000**, less than average of **£227,000** in South Somerset and the average of **£270,000** in England and Wales. The price of all properties in Chard are **7.2 times** the average annual resident household income before housing costs, slightly more affordable than South Somerset (**7.5 times**) and better than England overall (**8.1 times**). Affordability of properties increases substantially with flats/maisonettes, which are less than **4 times** the average annual household income before housing costs, based on an average household value of under £100,000.

Housing affordability relative to South Somerset is a key strength for Chard, providing an affordable location to live whilst retaining access to the natural assets. Lower values can be an indication of lower demand compared to other places, suggesting that more needs to be done to make the area a more desirable location to live. Improving the town centre offer will enable Chard to capitalise on housing affordability and attract new working age residents to live and work in the area.

Figure 9) Median House Prices, 2018

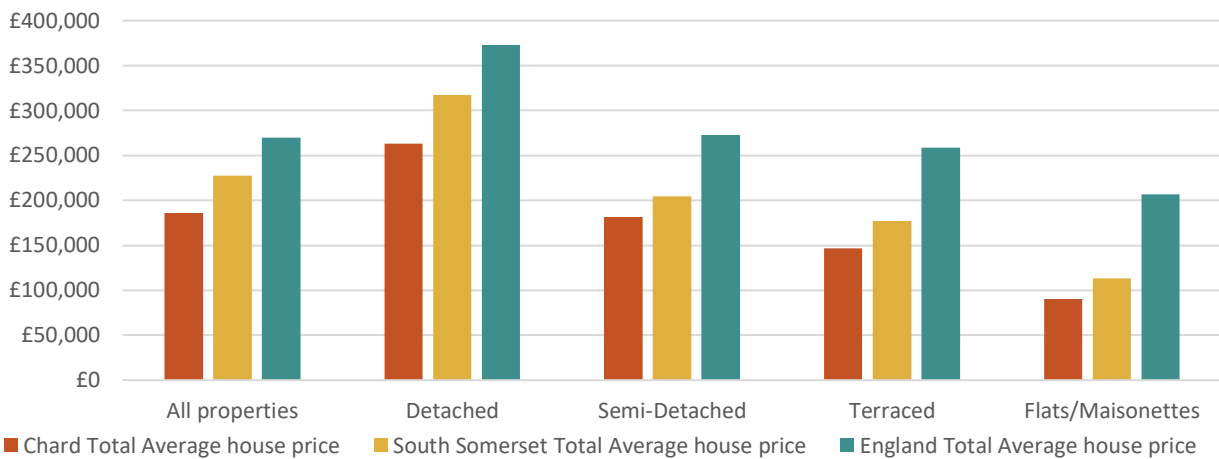
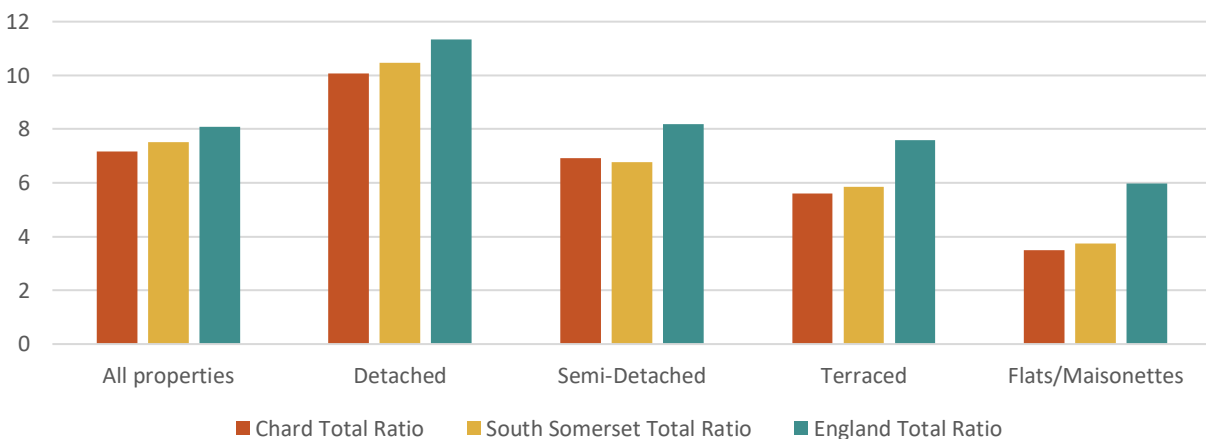


Figure 10) Ratio of Median House Price to Net Household Income, 2018



Source: ONS, Ratio of median house price to net annual household income before housing costs, 2018. Accessed [here](#).

Challenge 5 Opportunities:

- Deliver a mix of housing options for residents, with a focus of attracting younger working age residents who are likely to be first time buyers.
- Deliver the supporting community infrastructure to maintain the sustainability vision and community integration with local growth

Challenge 6: Enhance the town centre role and quality offer ...

Chard town centre... community service focus

The core town centre is relatively compact and focused on Fore Street and Holyrood Street. The town centre vacancy rate has increased closer to the national average at the start of 2021 (12.4%) although new investment is taking place with the recent arrival of Home Bargains. The town currently retains three banks or buildings societies which are often at risk following national trends.

Comparison shopping still dominates the town centre offer at around 30% of all units, although lower than the national average of 39% and with fewer national operators and a more limited range than larger, destination, town centres.

Chard provides a much higher level of retail services (hairdressers, opticians etc) occupying nearly 21% of all town centre units compared to 12% on average across the UK, reflecting the strong community-oriented role of Chard town centre.

Town centre food shopping is slightly lower than the national average provision and includes a Sainsburys supermarket off Bath Street as well as several specialist (Polish) food outlets and a local butcher. Further food shopping is available outside the town centre with a large Tesco store and Lidl serving the wider Chard area.

The food and drink and social scene – including nightlife - lacks depth and sometimes quality with an opportunity for an enterprising culture to fill gaps in the market and potential to re-enforce its rural setting and connection with food and farming.

Table 4) Town Centre Uses – Ground Floor units

Use	Chard 2021		UK
	Number	%	%
Convenience (Food)	10	7.3%	8.0%
Comparison Shopping	41	29.9%	39.0%
Retail Service	27	19.7%	12.0%
Retail Leisure	23	16.8%	18.0%
Business	19	13.9%	10.0%
Vacant	17	12.4%	13.0%
Totals	137	100.0 %	100.0 %

Source: SSDC Retail Monitoring January/February 2021

Figure 11) Town centre distribution of uses

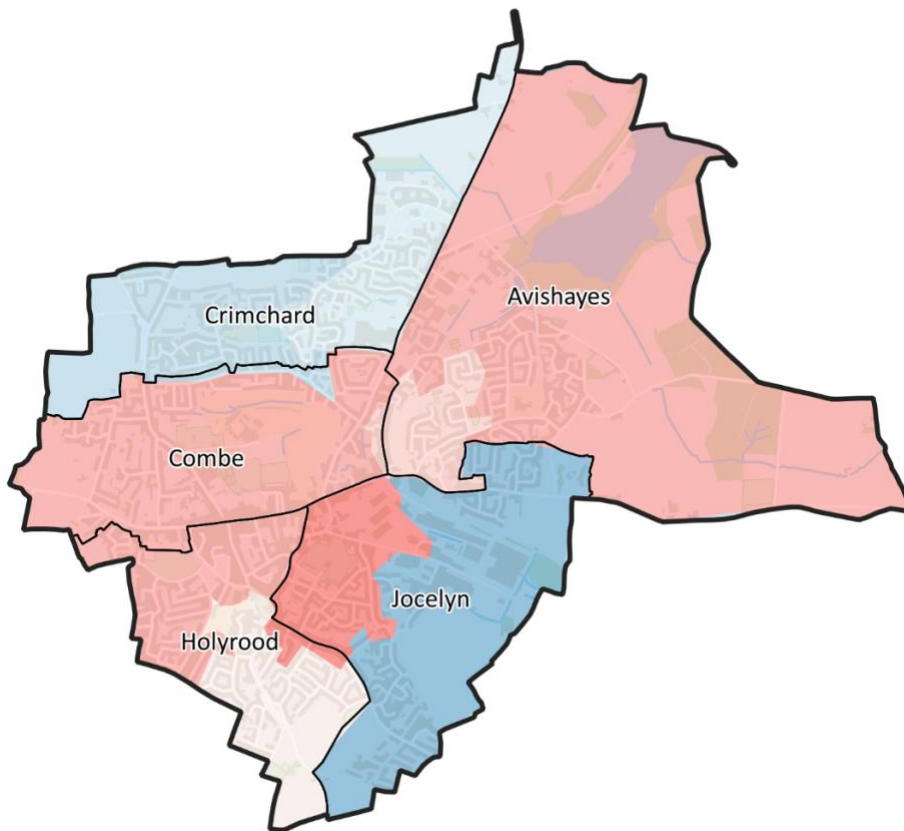


Source: SSDC Retail Monitoring January/February 2021

Issues of crime in the town centre...

According to ONS indices of deprivation, the area south of the town east of the town centre within the **Jocelyn ward** falls within the top 20%. Other areas in Chard, including north of Holyrood, Combe and Avishayes fall within the top 30% most deprived. This suggests that there is a need to address issues of crime and anti-social behaviour, particularly in town centre area.

Figure 12) Crime Deprivation, 2019



Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).



Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#)

Challenge 6 Opportunities:

- Deliver events and cultural programmes to increase footfall and improve the town centre offer and distinctiveness as a destination.
- Work with the police to explore potential for greater visibility of officers and further support from Community Support Officers

Appendix 1 – Deprivation Maps & Description

The **Index of Multiple Deprivation (IMD)** is the official measure of relative deprivation in England. It is based on **39 separate indicators** organized across **seven distinct domains** of deprivation. A deprivation score across these domains is given to every **Lower Super Output Area (LSOA)** in England, small statistical areas or neighbourhoods containing around **1,000 residents**. There are precisely **32,844 LSOAs** in the England.

All **LSOAs** are ranked according to their level of deprivation relative to that of other **LSOAs** in England. **Highly ranked** LSOAs can be referred to as being **‘most deprived’** or **‘highly deprived’**. It is important to note that there is no definitive threshold above which an area is described as ‘deprived’, as this rank is relative to other areas and is not based on an absolute scale. For example, a neighbourhood ranked **100th** is more deprived than a neighbourhood ranked **200th** but is not twice as deprived.

For the purposes of comparison, LSOAs are sorted into **deciles** from **1 to 10** based on their rank against all LSOAs in England. For example, if an LSOA ranks in the **highest 10%** of LSOAs in England for a deprivation domain, its **decile is 1**. Alternatively, if it ranks in the **lowest 10%** its **decile is 10**. The table adjacent shows the rank, % rank and deprivation decile for illustration.

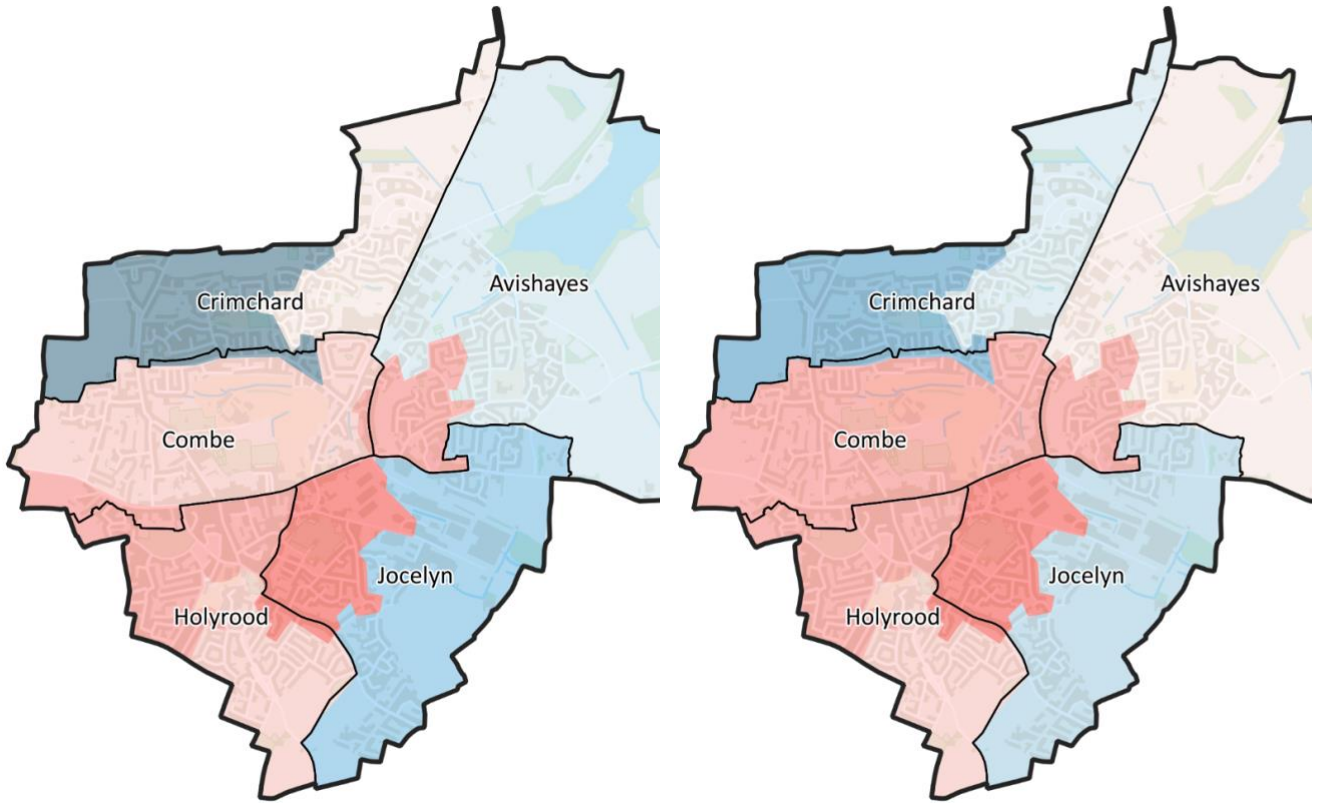
The maps below show the relative deprivation of LSOAs in Chard compared to all LSOAs in England. This is shown for the overall index of deprivation and the 7 distinct domains. Each map is colour coded based on the deprivation decile of each LSOA, where 1 is the most deprived 10% of LSOAs in England. This corresponds to the data presented as reference in appendix table 2.

Appendix table 1) Deprivation ranks and relative % most deprived and decile

Rank (out of 32,844 LSOAs)	% rank	Deprivation Decile
3,284	10%	1
6,569	20%	2
9,853	30%	3
13,138	40%	4
16,422	50%	5
19,706	60%	6
22,991	70%	7
26,275	80%	8
29,560	90%	9
32,844	100%	10

Overall

Employment



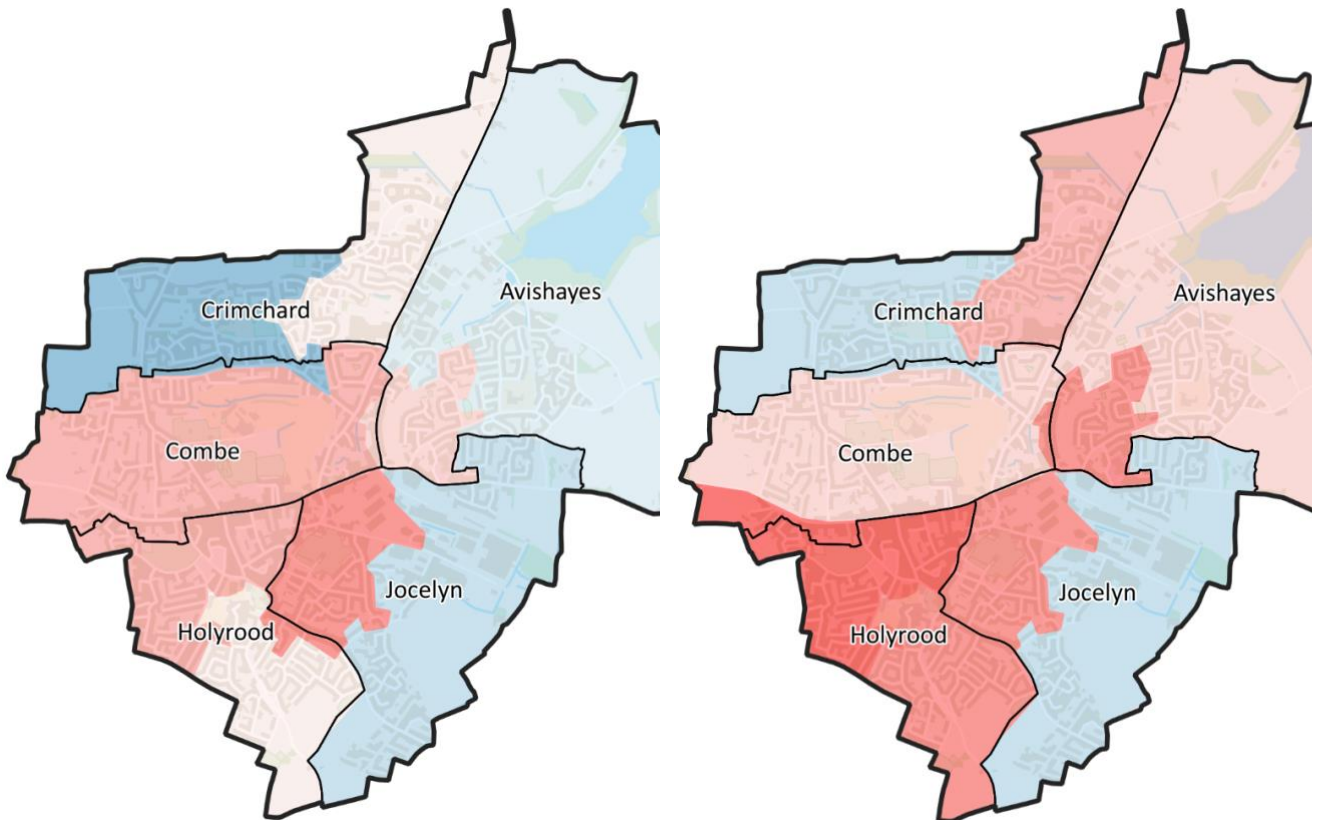
Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).

< Most deprived **1** 2 3 4 5 6 7 8 9 10 Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#)

Income

Education



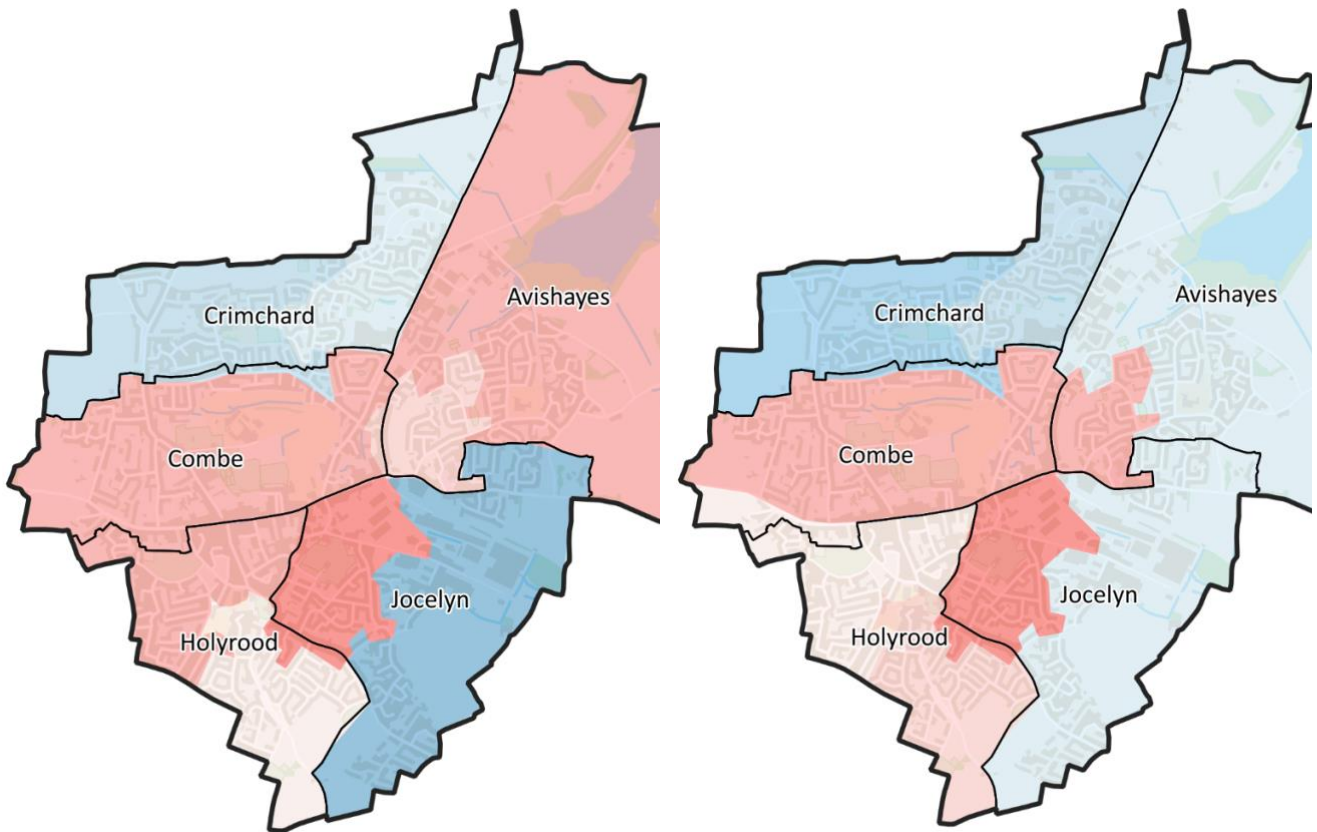
Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).

< Most deprived **1** **2** **3** **4** **5** **6** **7** **8** **9** **10** Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#)

Crime

Health and Disability



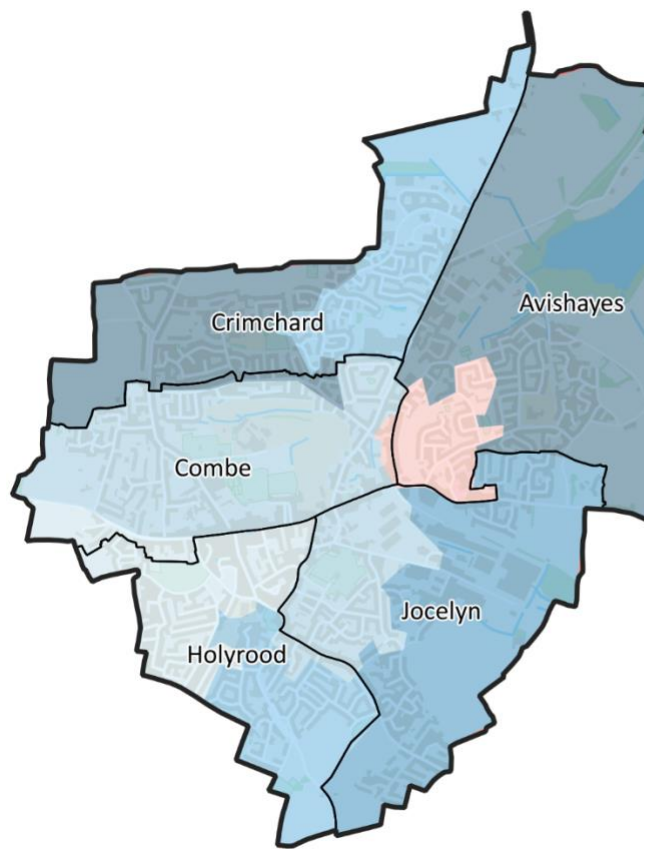
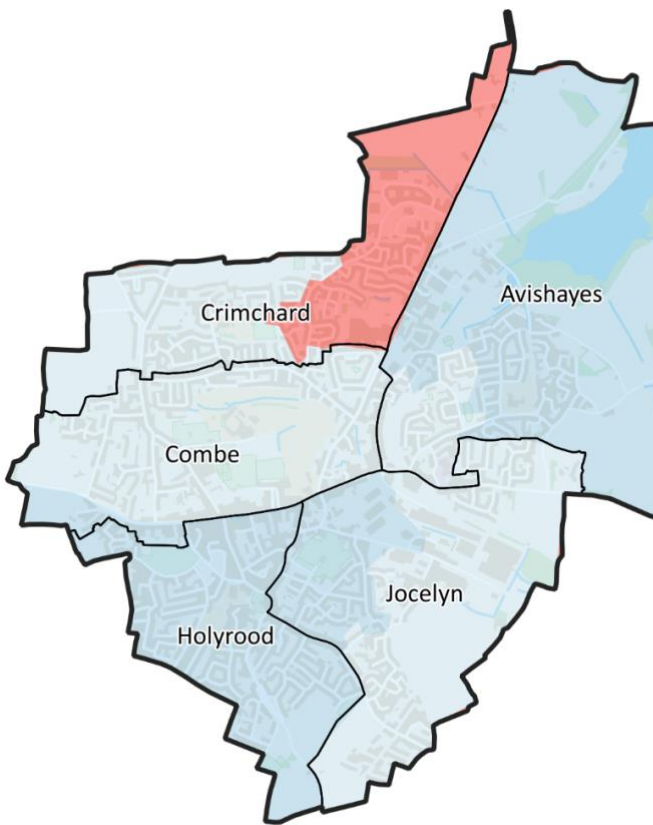
Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).

< Most deprived **1** **2** **3** **4** **5** **6** **7** **8** **9** **10** Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#)

Barriers to Housing

Living Environment



Deprivation Decile (where 1 is most deprived 10% of LSOAs in England).

< Most deprived **1** **2** **3** **4** **5** **6** **7** **8** **9** **10** Least deprived >

Source: MHCLG, English Indices of Deprivation, 2019. Accessed [here](#)

Appendix 2 – Chard Wards Socio-Economic Profiles

There are five ward areas within Chard as follows:

- Avishayes
- Coombe
- Crimshaw
- Holyrood
- Jocelyn

The location and boundary of each ward area is shown opposite with an overview of the socio-economic context of each area set out over the following pages.



Source: Google Maps Contains OS data © Crown copyright and database right 2021

The ward profiles are drawn from information contained within Somerset Intelligence web site and captures data from ONS and other sources. For some aspects the latest available small area data is from the 2011 Census which will only be updated once results from the more recent 2021 Census are released.

Some of the indicators highlighting relative differences between the Chard wards are shown in the table below. Elements of significant difference are highlighted in green. Those elements of particular concern in Chard are highlighted in amber. Where performance rates are shown these are benchmarked in relative terms against the Somerset County average rate.

Table 1: Chard Wards Socio-Economic Overview (

	Avishayes	Combe	Crimchard	Holyrood	Jocelyn
Population 2019	2,800	2,200	2,900	3,500	2,500
Popn 2011-19	▲+17%	▼-12%	▲+21%	▲+17%	▼ - 17%
Age 0-14	21.4%	15.2%	19.4%	18.2%	17.6%
Age 65+	19.3%	28.9%	23.0%	23.8%	25.4%
All age mortality Rate*	+12%	+17%	-16%	-10%	+63%
Crime rates*					
Violence & Sexual	+23%	+54%	-31%	+50%	-18%
Anti-social behaviour	+73%	+116%	-45%	+110%	+68%
Free School Meals*	+38%	-14%	+33%	+30%	+58%
Key Stage 2*	-12%	-5%	-5%	=	+21%
Reading Writing Maths					
GCSE English & Maths*	-47%	-8%	+8%	-7%	+8%

Source: Somerset Intelligence from various data sets

All indicators marked * are benchmarked relative to the Somerset County average rates.

Procurement Strategic Framework and Revised Standing Orders

Executive Portfolio Holder:	Peter Seib, Finance, Legal and Democratic Services
Strategic Director:	Nicola Hix, Director, Strategy and Support Services
Lead Specialist:	Brendan Downes, People Performance and Change
Lead Officers:	Lynda Pincombe, Procurement Specialist Brendan Downes, People Performance and Change
Contact Details:	Lynda.pincombe@southsomerset.gov.uk or 01935 462614

Purpose of the Report

1. To present the following draft suite of procurement documents to members for adoption:
 - Revised Contract Standing Orders
 - Procurement Strategy
 - Social Value Policy
 - Contract Management Framework

Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of October 2021.

Public Interest

3. Procurement is the process of acquiring goods, works and services from third parties.
4. In 2021, the total procurement spend for SSSDC was just under £19.2million so even small cost reductions can have a big impact. Therefore, it is important to have clear plans and guidance in place in relation to the Council's procurement process to help the Council achieve optimum value for money for the public purse from the procurement process, including contract management.
5. Procurement can assist Council's to achieve better outcomes for their residents. It can deliver benefits to our communities and local economy through specifying additional social value and engaging with local companies and voluntary sector groups.
6. The Council is required by law to have procedure rules (known as Contract Standing Orders) to ensure competition and regulate the procurement process.

Recommendations

7. That District Executive recommend that Full Council agree to:-
 - a. Adopt the following procurement documents:

- Revised Contract Standing Orders
- Procurement Strategy
- Social Value Policy
- Contract Management Framework

and update the Council's Constitution accordingly.

- b. Delegate authority to the Monitoring Officer in consultation with the Portfolio Holder to make minor amendments to the Contract Procedure Rules, provided any such amendments are reported to the next appropriate meeting of Council.

Background

8. In 2018 the Local Government Association (LGA) published a revised National Procurement Strategy (NPS). The national strategy provides guidance and a toolkit to assist local authorities to develop their own procurement competencies in order to achieve better outcomes for their residents at a time when obtaining value for money and 'doing more for less' is increasingly important. Adopting good practice identified through engagement with the South West Procurement Board and neighbouring authorities, a series of approaches and interventions have been developed and implemented since 2018. These tactical and strategic approaches have enabled SSDC's procurement delivery, progressed the authorities compliance position and alignment to the national procurement strategy. The suite of documents supporting this paper now seek to formally embed these approaches as well as set out the next stage of the roadmap to align with the identified themes in the NPS 2018.
9. This suite of documents articulates how the Council's procurement function operates in compliance with the Public Procurement Regulations 2015 (PCR2015), Transparency requirements and the Social Value Act 2012, as well as supporting the delivery of our corporate objectives and key strategies.

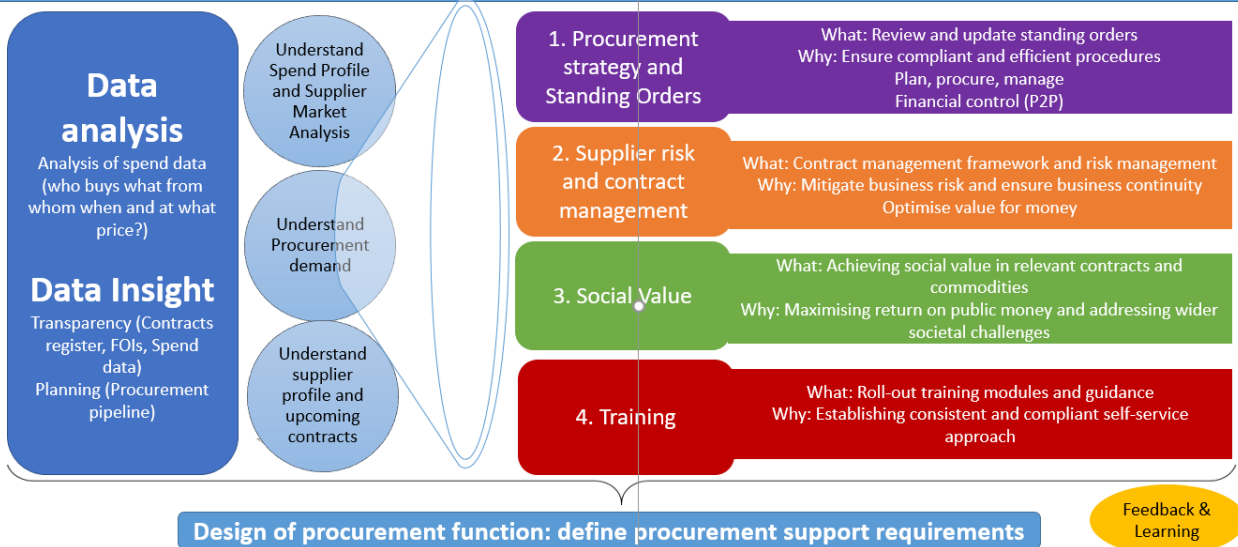
Report Detail

10. The suite of documents establishes the parameters and guidance for how procurement operates at SSDC and how as an authority we are embedding the principles of good practice set out in the NPS 2018 and supporting delivery of the corporate objectives. Formal approval of this framework is now sought to enable us to move into the training phase of the roadmap.
11. The table below summarises the framework that officers have developed. The key features of each of the framework documents are detailed below and attached in full as appendices.

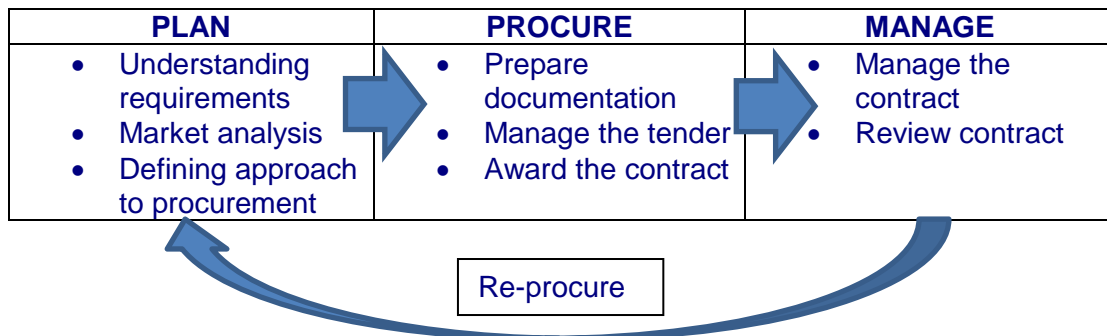


Procurement strategy Contract procedure rules Social Value strategy Contract management framework

1. Refresh, simplify and embed effective and compliant procurement processes in line with emerging legislative framework
2. Develop a risk-based approach to contract and strategic supplier management
3. Embed approach to Social Value through procurement in support of the Recovery Strategy
4. Building SSDC competence and capability throughout the commercial lifecycle to support a self-service approach



Key features of the revised Contract Standing Orders



12. The document sets out the legal and regulatory parameters that Officers must operate to and provides a framework for procurement activity based on value, complexity and risk of individual procurement activity. Typically, the greater the value, complexity and risk, the more important a project or programme will be and the more robust and rigorous a process is required to successfully set up, procure and manage contracts relating to it.

13. Below the PCR2015 thresholds (for Goods and Services, the current PCR2015 threshold is £189,330 and it is £4,733,252 for Works contracts), there will be flexibility on the requirements from bidders depending on the value, complexity and risk of the contract. This will be agreed in consultation with the Procurement Specialist.

14. Key Officer responsibilities are made clear across the procurement lifecycle. Specific guidance and training to support Officers is being developed and refined following feedback during Q3 2021. There are three strands to the training and guidance:



- a. Upskilling the specialist procurement team, including the Procurement Specialist new to the post, and the supporting Case Officers that will partner with specific business areas to provide focused procurement support
- b. General upskilling to support the self-service model. The default approach to procurement activity will be self-service supported by the procurement specialist staff where required and based on value, complexity and risk of the procurement activity.
- c. Developing a focus on contract management capability across SSDC organisation is an important tool in delivering value from existing contracts which will be a key requirement moving into Local Government Reorganisation.

Procurement Strategy

15. The draft procurement strategy sets out our vision and our priorities for the period leading to the formation of a new Authority. The Procurement Strategy:
 - incorporates the latest government procurement legislation and initiatives
 - brings a focus to the objective of providing quality services that support the delivery of strategic priorities
 - enables responsiveness to the needs of our communities
 - enables delivery of optimum value for money.
16. The strategy articulates and seeks to formalise existing practice as well shaping an action plan for the forthcoming year. This action plan will be reviewed by the Lead Specialist – People Performance and Change and the Procurement Specialist on a quarterly basis and will be amended to respond to any emerging changes through local government reform or procurement legislation.
17. The key aims of the procurement strategy are to:
 - Refresh, simplify and embed effective and compliant procurement processes to support strong commercial outcomes and risk management.
 - Embed contract and strategic supplier management: working with internal and external partners, and strategic suppliers to deliver more efficient and effective commercial outcomes.
 - Embed approach to Social Value by developing enabling activity.
 - Develop SSDC competence throughout the commercial lifecycle to support a self-service approach.
18. To enable delivery of our self-service model, procurement business partnering is being introduced to support directorates, and officers will be trained to the required level of competency.

19. Social value is about improving economic, social and environmental wellbeing from SSDC contracts over and above the delivery of the services directly required at no extra cost. Used properly, additional social value can be beneficial to local stakeholders, suppliers and councils and represents a joint effort to exploit maximum value from procurement. This can bring direct benefits to the South Somerset economy, local communities and the environment.
20. Councils that have fully included social value requirements have shown it is possible to generate up to 20 per cent added value on top of contract value by way of direct community benefits. This added value is measured quantitatively using a national framework of measures which is aligned to the Government Green Book. The South Somerset Social Value Policy adopts this methodology in seeking to bring these direct benefits to South Somerset.

Key Features of the Social Value Policy:

21. The draft Social Value policy seeks to promote the following aims through South Somerset's procurement activity:
- Support the future prosperity of South Somerset, its businesses and all its citizens
 - Enhance social opportunity and cohesion in a dynamic and changing business environment
 - Help to develop improvements for disadvantaged neighbourhoods and people
 - Create and maintain a sustainable, clean, safe and attractive environment for living, work and leisure
22. Delivery of the draft Social Value policy will support all five Themes of the Council Plan and in particular the ambition to "Embed Social Value into all processes and activities to ensure we maximise the support we give to our communities".
23. The Council will periodically review its Social Value Policy in consultation with key stakeholders. In doing so it will take into account any changes in legislation pertaining to the Social Value Act 2012, Public Contracts Regulations and the Council Plan.

Contract Management Framework

24. A significant level of the organisation's budget is spent on external third-party service providers.
25. The reliance and dependency on external market solutions has increased and therefore, the performance of these supply markets is vital to council in achieving its strategic aims both in terms of service quality and managing and balanced budget.
26. Public Sector contracts are increasing in commercial complexity and size typically this increased contract duration and sourcing difficulties. Managing commercial relationships



27. The framework aims to:

- To embed a consistent, risk based approach to Contract Management across the organisation that can be applied to all external third-party relationships.
- To increase awareness of contract management activity and its contribution to the organisations future agenda by;
 - a. Developing a culture of continuous improvement internally and across the supplier base;
 - b. Enabling contract managers to understand how they can contribute to securing benefits such as sustainability or better local economic, social and environmental benefits (social value) and savings;
 - c. Ensuring that there is a strong linkage between commissioning strategies incorporating good procurement and contract management practices across the business.
- To recognise the distinctive commercial skills and capabilities that good contract management requires and ensure these are embedded as business as usual and factored into new business activity.
- To provide the necessary guidance and training on contract management processes.

28. This framework and its deployment across the Organisation will be owned and managed by the Procurement Function, with sponsorship and executive oversight by Director of Strategy & Support Services.

29. Following feedback from Senior Leadership Team, it was agreed that Contract Management should have an increasing focus and prioritisation with respect to upskilling in the organisation. As a result of the Local Government Review decision, there will be a reduction in tender activity in the coming period and SSDC will need to ensure that existing contracts continue to offer value for money. A plan for delivering a contract management training programme has now been developed and is summarised below:

- Using our Contract Management Framework those contracts classified as Gold or Silver have been reviewed and contract managers identified. These contract managers will be invited to complete an internal SSDC introductory course in contract management and will also be supported in completing the accredited Cabinet Office Contract Management Foundation course during quarter 3, 2021.
- The training programme for the Procurement team has now commenced and the team are upskilling across the Plan, Procure and Manage stages of the Procurement Cycle. The Plan, Procure and Manage stages within the CSO's will accordingly be supported by training and guidance materials. The guidance will reflect SSDC requirements for



South Somerset District Council

delivery of procurement activities across the lifecycle and will be delivered in quarter 3, 2021.

Summary

- 30. The documents will be kept under periodic review to address any changes required during the period of Local Government Reform and the UK withdrawal from the EU.
- 31. The documents will have a shelf life aligned to the programme of transfer to the new authority.

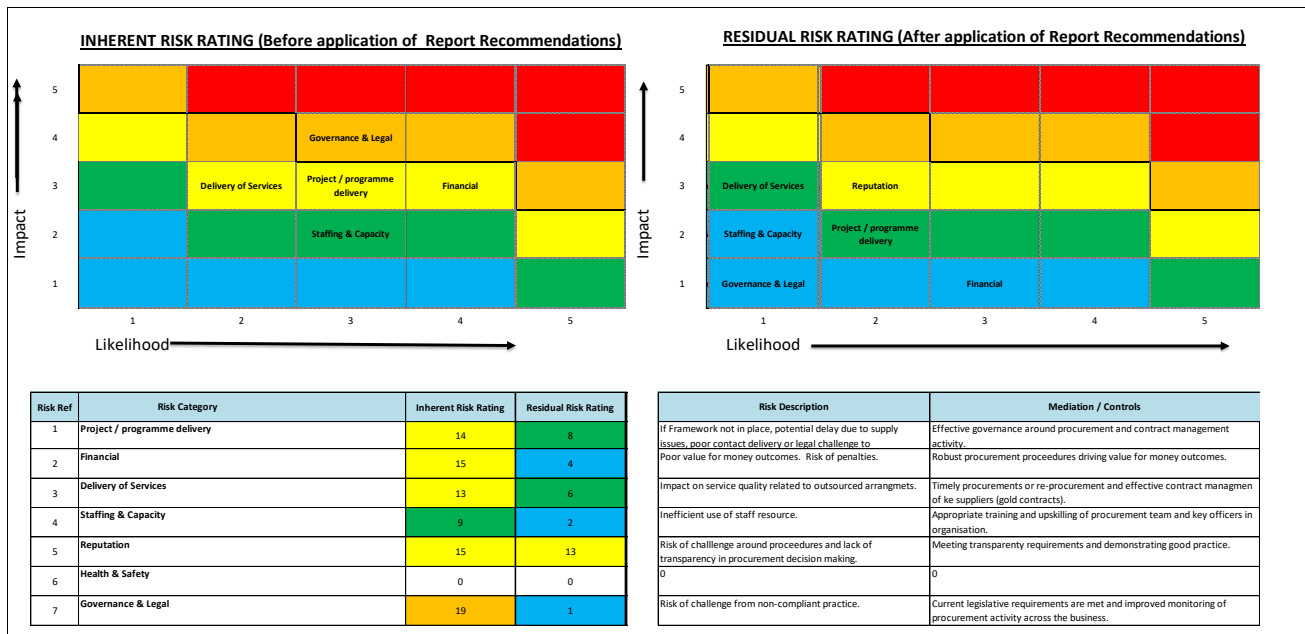
Financial Implications

- 32. There are no new financial implication arising from this report. The training requirements of the Procurement Function will be met from existing budgets.

Legal implications (if any) and details of Statutory Powers

- 33. Revised Contract Standing Orders will need to be incorporated within SSSDC Constitution, when approved.
- 34. Contract Standing Orders will be kept under review to respond to any legislative changes following UK withdrawal from the EU.

Risk Matrix



Council Plan Implications

- 35. The adoption of procurement framework documents supports the following Council Plan priority areas:
 - To ensure a modern, efficient and effective council that delivers for its communities,

- To assist businesses to recover from the Covid-19 pandemic whilst supporting growth within the South Somerset economy

Carbon Emissions and Climate Change Implications

36. No implications directly related to this report.

Equality and Diversity Implications

37. Equalities Impact Relevance Check completed.

Privacy Impact Assessment

38. Not applicable.

Background Papers

39. Not applicable

Additional Documents

- Revised Contract Standing Orders
- Procurement Strategy and related Appendix 2 Procurement Spend Analysis 2020-2021
- Social Value Policy
- Contract Management Framework



Procurement Strategy
2021-2023

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Table 1 - Revision History

VERSION	CHANGE	DATE
1.00	DRAFT FOR COMMENT BY LMT – BRENDAN DOWNES	30/06/2020
2.00	REVISIONS FOR COMMENT – MICHAEL O’HALLORAN AND REVIEW BY S151 OFFICER	29/10/2020
3.00	REVISIONS TO ACTION PLAN	17/08/2021

DRAFT

1. PURPOSE OF THIS DOCUMENT

This document describes what South Somerset District Council will do to ensure our procurement activities support the delivery of our Council Plan and corporate priorities. It provides all stakeholders with the principles that will direct procurement practices and explains the changes and actions planned to take place across the whole procurement lifecycle over the next three years.

Our key objectives are to:

1. Refresh, simplify and embed effective and compliant procurement processes to support strong commercial outcomes and risk management.
2. Embed contract and strategic supplier management, working with internal and external partners, and strategic suppliers to deliver more efficient and effective commercial outcomes.
3. Embed approach to Social Value by developing enabling activity. This includes developing and embracing socially responsible and sustainable procurement, by engaging with local and regional suppliers to promote the local economy and taking account of the social, economic and environmental impact of spending decisions.
4. Develop the SSDC infrastructure, including people and processes, throughout the commercial lifecycle to support a self-service approach.

The strategy is informed by the National Procurement Strategy, The Public Contracts Regulations 2015 and the Local Government Transparency Code 2015 (please refer to appendix 1: Transparency requirements).

2. INTRODUCTION

2.1 PURPOSE OF THE PROCUREMENT STRATEGY:

The strategy sets out our vision and our priorities for the next three years to 2023 incorporating the latest government procurement legislation and initiatives.

We aim to provide quality services that are responsive to the needs of our communities and deliver optimum value for money.

The strategy sets out how we aim to achieve this over the longer term and includes an action plan for the forthcoming year which will be reviewed on a quarterly basis by (S&C management) with a revised action plan produced each year.

This strategy recognises that some procurements are more complex than others with varying supply markets and levels of expenditure, and the feasibility of deployment of the principles set out in the strategy must be in context to specific procurement events.

However, by consideration and adaption of the strategy to individual procurements we can expect to improve the quality of the goods, services and works which we purchase, achieve value for money and make the savings necessary to support the austerity measures, as well as achieve the strategic priorities as identified in the council's corporate plan.

2.2 WHAT IS PROCUREMENT?

Procurement is concerned with securing goods, works and services. The process spans the whole cycle, from identification of needs through to the end of a service or the end of the useful life of an asset and its disposal. It is concerned with securing goods and services that best meet the needs of users and the local community in order to help achieve our key priorities. It supports the commissioning of services and supports work on developing markets where appropriate.

2.3 BENEFITS OF PROCUREMENT

The status and importance of procurement in the public sector continues to grow and there is increasing pressure to improve procurement performance for a number of reasons.

These include:

- procurement has a critical role to play in delivering strategic objectives and improving the quality of services delivered to the public
- savings realised through improved procurement can be channelled into priority services or reducing the organisations net capital and/or revenue expenditure
- local authorities are open to legal challenge under public procurement regulations (based on EU directives) and are accountable for achieving value for money
- Local government is under increasing pressure to deliver services in the face of reduced funding from central government. Effective procurement is one of the key ways to achieve "more with less".

2.4 CONTEXT

The Local Government Association (LGA) published the [National Procurement Strategy \(NPS\) in 2018](#). The NPS builds on councils' achievements under the National Procurement Strategy for Local Government in

England 2014 – the first strategy developed by and for English councils. The SSDC strategy seeks to align with the key themes and objectives which have been set out within the NPS 2018.

In addition, the economic environment, both nationally and locally, continues to require us to focus on obtaining value for money and 'doing more for less'. Therefore, it is the intention that this strategy supports the achievement of the Corporate Objectives of South Somerset District Council.

South Somerset District Council will also engage with partner organisations such as the South West Procurement Board which provides a representative group of Partner Organisations (local authorities and public bodies) to support delivery and provide a forum for supporting collaboration at a regional and sub-regional level.

3. SPEND ANALYSIS

A link to historical Annual Spend data analysis will be available covering the period 2016/17 through to the current year 2020/21. This data for 2020/21 is currently summarised as shown in Appendix 2 Procurement Spend analysis 2020_21.

4. KEY OBJECTIVES

South Somerset District Council have identified a number of key areas for improvement of purchasing activities based on the [National Procurement Strategy](#).

A number of specific objectives have also been identified to support the Council Plan Themes and priority areas of focus. The Council Plan can be viewed at <https://www.southsomerset.gov.uk/your-council/your-council-plan-and-strategies/council-plan/>

4.1 REFRESH, SIMPLIFY AND EMBED EFFECTIVE AND COMPLIANT PROCUREMENT PROCESSES TO SUPPORT STRONG COMMERCIAL OUTCOMES AND RISK MANAGEMENT.

This includes the key areas identified in NPS 2018, The Public Contracts Regulations 2015 and the Local Government Transparency Code 2015.

4.1.1 Ensuring regulatory and procedural compliance

Reviewing SSDC Procurement Procedures to support a self-service model while ensuring the foundations for compliance are in place, as well as a proactive and innovative approach to achieving commercial outcomes.

4.1.2 Meeting Transparency requirements

Publication of procurement opportunities and contracts data in accordance with the Local Government Transparency Code 2015. Specific elements are publication of expenditure exceeding £500, Government Procurement Card transactions, and details of any legally enforceable agreement with a value that exceeds £5,000 (via a contracts register). The principle being to ensure that procurement and contract management Information is available online to all stakeholders.

4.1.3 Exploiting digital technology (NPS Enabler)

Use of P2P systems, online ordering platforms and the use of electronic tendering and quotations system for tenders.

4.1.4 Increasing use of procurement frameworks

Evaluating the optimal route to procure for each spend category, as the reduction of OJEU / complex exercises will be a priority to reduce operating costs and to take advantage of aggregated demand.

4.1.5 **Managing the procurement pipeline**

Manage and support SSDC demand, and develop the procurement pipeline through increased data analysis for increased market intelligence and more effective planning, scheduling and resourcing of procurement activities across the lifecycle.

4.2 EMBED CONTRACT AND STRATEGIC SUPPLIER MANAGEMENT: WORKING WITH INTERNAL AND EXTERNAL PARTNERS, AND STRATEGIC SUPPLIERS TO DELIVER MORE EFFICIENT AND EFFECTIVE COMMERCIAL OUTCOMES.

This includes the following key areas identified in the NPS 2018 & the Council Plan priority, **Protecting Core Services**.

4.2.1 **Engaging Strategic Suppliers**

Identifying strategic suppliers and contracts, and engaging with them to improve performance, reduce cost, mitigate risk and harness innovation.

4.2.2 **Managing key contracts and relationships**

Appropriate and effective management and control of contracts from their planned inception until their completion by the appointed contractor(s).

4.3 EMBED APPROACH TO SOCIAL VALUE BY DEVELOPING ENABLING ACTIVITY.

This includes developing and embracing socially responsible and sustainable procurement, by engaging with local and regional suppliers to promote the local economy and taking account of the social, economic and environmental impact of spending decisions.

4.3.1 **Sustainable Procurement**

This includes the following key areas identified in the NPS 2018 & the Council Plan priorities, **Healthy, Self-reliant Communities & Environment**.

I. **Obtaining social value**

Creating additional wider financial and non-financial impacts of programmes, organisations and interventions, including the wellbeing of individuals and communities, social capital and the environment.

II. **Achieving our carbon reduction targets**

Specific interventions and initiatives that will reduce the environmental impacts of our operations and activities, in relation to procured goods, works and services.

4.3.2 **Engagement with SMEs/VCSE**

This includes the following key areas identified in the NPS 2018 & the Council Plan priority, **Economy**.

I. **Engaging local small medium enterprises (SMEs) and micro-businesses**

SMEs play a major role in creating jobs and generating income for those on low incomes; they help foster economic growth, social stability, are a source of innovation and contribute to the development of a dynamic private sector.

II. **Enabling voluntary, community and social enterprise (VCSE) engagement**

VCSE organisations can play a critical and integral role in delivering to our communities and residents, including as providers of services; advocates; and representing the voice of service users.

4.4 DEVELOP SSDC COMPETENCE THROUGHOUT THE COMMERCIAL LIFECYCLE (PLAN-PROCURE-MANAGE PHASES) TO SUPPORT A SELF-SERVICE APPROACH

This includes the following key area identified in the NPS 2018.

4.4.1 Working with internal and external partners

Embedding a 'one team' approach to the design and implementation of solutions for public services which spans council departments and organisations. The team approach should characterise how SSDC departments work together and how SSDC works with other councils, health, fire, police, housing, VCSEs and other partners.

4.4.2 Guidance and training to drive upskilling of staff for self-service delivery in accordance with the establishment model.

Ensuring appropriate quality and availability of procurement support to the organisation, and the availability of methods templates and guidance documents to support officers in engaging effectively with third parties. Everyone with purchasing responsibilities should be competent to the required level of training defined by the Procurement Specialist and reach out to the Procurement Function where specialist knowledge is required. Procurement Business Partnering will be introduced to support the Directorates and they will be trained to the required level of competency.

5. WHAT WILL SUCCESS LOOK LIKE?

OBJECTIVE	ACTIVITY	METRIC
Refresh, simplify and embed effective and compliant procurement processes to support strong commercial outcomes and risk management.	Meeting Transparency requirements	Delivery of mandatory quarterly statements to public website within U+ 10 days
	Exploiting digital technology	% Invoices received with no purchase Order quoted % Invoices processed automatically with 3 way matching (PO/GR/IR)
	Increasing use of procurement frameworks	% of purchasing volume procured via Frameworks (measured from contracts register)
	Managing the procurement pipeline	% of tenders on pipeline
Develop contract and strategic supplier management	Engaging Strategic Suppliers	% of High Risk Contracts with a nominated (and appropriately qualified) Contract Manager. (Contracts as derived from commodity risk analysis and in accordance with Contract Management Framework)
	Managing key contracts and supplier relationships	% (Nr) of High Risk Contracts with the Contract Management Framework applied.
Embed approach to Social Value by developing enabling activity Sustainable Procurement and engagement with SMEs/VCSE	Obtaining social value	£ Value of additional social value generated through procurements, using Green Book // TOMs methodology and recorded in the Social Value Portal. Track SV Commitments and Delivered SV.
	Achieving our carbon reduction targets	Our ambition is to be carbon neutral across our own operations and land

		holdings by 2030 at the latest, and ideally by 2023.
	Engaging local small medium enterprises (SMEs)	>80% of tender / contract opportunities over £50k advertised on the regional portal
		Volume of spend delivered through local AND SME suppliers (within SSDC District area), as a % of total influenceable spend for goods works and services
		Volume of spend delivered through local SME suppliers (within 30 mile radius of Yeovil), as a % of total influenceable spend for goods works and services
	Enabling voluntary, community and social enterprise (VCSE) engagement	Placeholder: Currently no baseline figures for spend with the 3rd sector. It would therefore be difficult to set any firm spend targets.
Develop SSDC infrastructure, including people and processes throughout the commercial lifecycle (Plan-Procure-Manage phases) to support a self-service approach	Support to organisational learning and practice	Delivery of tactical activities (improvement actions and tenders) as described in action plan

6. ACTION PLAN: 2021 - 2023

The strategic action plan is prioritised according to four priority levels and will be updated quarterly to reflect progress, emerging priorities and new objectives.

high	these tasks, some of which require immediate action, should all be achieved within the next four months.
medium	to be achieved with period leading to formation of the new Authority
low	to be a placeholder for future planning.
ongoing	on-going review during period leading to formation of new Authority, or initiative that was previously delivered and is now an ongoing continuous process

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6.1 REFRESH, SIMPLIFY AND EMBED EFFECTIVE AND COMPLIANT PROCUREMENT PROCESSES TO SUPPORT STRONG COMMERCIAL OUTCOMES AND RISK MANAGEMENT.

Council Plan: Protect core services to the public by reducing costs and seeking income generation.

Commercial Strategy: Public money is applied with proportionate and efficient regard to procurement and governance procedures

Outcome	Action	Priority	Status
Meeting Transparency requirements	Quarterly publication of expenditure exceeding £500, (Delivered by Finance Team)	Ongoing	Ongoing
	Quarterly publication of Government Procurement Card transactions. (Delivered by Finance Team)	Ongoing	Ongoing
	Quarterly publication of Contracts Register (Procurement)	Ongoing	Ongoing
	Publication of all Contract Opportunities > £25K via Contracts Finder and ProContract (Procurement)	High	Ongoing, but to be formally embedded following approval of Contract Standing Orders.
Exploiting digital technology	Deliver a closed loop P2P process and associated training to promote 100% purchase order coverage for all supplier invoices, and appropriate segregation of duties. (With Finance Team)	Medium	Improvement to be scoped and quick wins delivered during transition
	Increase use of ProContract & Contracts Finder platforms to ensure SSDC meet stakeholder and legal requirements and achieves best value through procurements.	High	To formally commence for all contracts >£25k following approval of Contract Standing Orders. Procurement Specialist and Business Partnering to support self-service model.
	Build on established spend data resources (Quarterly update of spend data including allocation to spend categories, mapping of Suppliers to categories, mapping of Suppliers to locality and organisational size)	Ongoing	Already established and maintained

	Analytics: Develop spend database solution to provide a sourcing tool, planning tool (pipeline of renewals), Contract register, and self-service reporting platform. Also to integrate carbon calculator (DEFRA SCOPE 3 Annex E) modelling	Ongoing to Medium	This is in the Procurement work plan as a priority project to deliver quick wins to support pipeline management. Further developments will need to be scoped during transition to new Authority.
Increase the use of procurement frameworks	Develop an "in principle" sourcing strategy for all categories of spend	High	In place. To be promoted through guidance and training programme Q3 2021
	Develop sourcing tool kit to support officers in selection of frameworks	High	Initial guidance and training during Q3 2021.
Managing the procurement pipeline	Exploiting our data to understand the procurement pipeline	High	Ongoing
	Liaising with stakeholders across the business to agree pipeline activities in accordance with priorities	High	Ongoing. Business Partnering approach to be launched with additional Case Officer Procurement support.
	Manage pipeline risk	High	Procurement Specialist monitoring the pipeline ongoing.

6.2 DEVELOP SSDC COMPETENCE THROUGHOUT THE COMMERCIAL LIFECYCLE (PLAN-PROCURE-MANAGE PHASES) TO SUPPORT A SELF-SERVICE APPROACH

Council Plan: Protect core services to the public by reducing costs and seeking income generation.
Commercial Strategy: Public money is applied with proportionate and efficient regard to procurement and governance procedures

Procurement will support the realisation of cost reduction and income generation through support to Make or Buy decisions, exploitation of co-operative and collaborative working and encourage innovation through its tendering practices.

Outcome	Action	Priority	Status
Pre procurement engagement guidance	Provide guidance and market testing / pre-procurement engagement to inform procurement activity and supply chain engagement	Ongoing	Ongoing. To be promoted through guidance and training programme Q3 2021.
Innovation in procurement of goods, works and services	Encourage innovation and improved practice in all tender activities and provide guidance to stakeholders.	Ongoing	Ongoing. To be promoted through guidance and training programme Q3 2021
	Develop and maintain fit-for-purpose Procurement standards (RFQ's, ITT's, Templates) – make available to officers to promote “self-service” model.	High	Templates in place. To be promoted through guidance and training programme Q3 2021 Longer term improvements to be scoped as a medium priority.
	Develop and maintain appropriate library of standard T&C's – including SME friendly - for key spend areas, including officer training. (Through Legal)	High	Ongoing work with legal team. To be promoted through guidance and training programme Q3 2021 Longer term improvements to be scoped as a medium priority.
Guidance to officers & delivery of procurements (Sourcing through to contract award) for Key packages supporting council priorities	Social Value offer in place Leisure Operator: CPN process w 10%% SV Public Realm Delivery Framework: SSDC owned framework w. 10% SV Leisure Operator	Ongoing	Leisure procurement is complete and SV

	<p>Yeovil regeneration: Westminster Street Chard The Triangle/Wine Street</p> <p>Social Value delivery will continue through current and future projects, including:</p> <p>Continued social value delivery through future regeneration tenders including: Middle Street West, High Street Borough, Middle Street East and Wyndham Street.</p> <p>Environmental improvements via Public Sector Decarbonisation Scheme and Park Homes projects</p> <p>The Octagon construction project</p>		<p>delivery being monitored under Contract Management Regime.</p> <p>Three regeneration procurement have taken place and SV delivery is being monitored.</p> <p>Ongoing</p> <p>Ongoing</p> <p>Planned</p>

6.3 EMBED CONTRACT AND STRATEGIC SUPPLIER MANAGEMENT

Protecting Core Services: To ensure a modern, efficient and effective council that delivers for its communities

- **Protect core services to the public by reducing costs and seeking income generation**
- **Identification of opportunities for reducing spend with suppliers**

Contract management is concerned with the continuous review and management of the contractual terms and / or service level agreement secured through the procurement process to ensure the outcomes agreed are actually delivered by suppliers or partners.

Managing the contracts and relationships is imperative to ensure that:

- I. the strategic priorities agreed at the outset are delivered in a cost effective and timely manner
- II. non-compliance or variation is identified early for escalation and resolution
- III. risks and costs are managed
- IV. reviews are undertaken and lessons learnt inform the commissioning and procurement process to ensure continuous improvement

Outcome	Action	Priority	Status
Contract management guidance & toolkit	Develop appropriate guidance and toolkit.	High	Toolkit in place 2020.
	Senior leadership adoption of CM guidance and toolkit	High	Part of approval process.
	Roll out of CM guidance and toolkit across the organisation	High	To be promoted through guidance and training programme Q3 2021
Identification of key contracts	Analysis of contracts landscape and assessment of criticality and risk	Ongoing	Through established Commodity & Supplier Risk Analysis

6.4.1 EMBED APPROACH TO SOCIAL VALUE: SUSTAINABLE PROCUREMENT

Healthy, Self-reliant Communities

- Embed social value into all processes and activities to ensure we maximise the support we give to our communities.

Environment

- Be a leading council in developing and adopting a Green Agenda to promote sustainable environment, economy and communities.
- Work with partners to promote recycling and minimise waste.

In line with our commitment to delivering The Public Services (Social Value) Act 2012 and our own sustainability policies we will ensure consideration of social value and sustainability in all relevant tender processes, to promote the positive social, economic and environmental benefits from the goods, works and services we purchase, and mitigate harmful actions.

Outcome	Action	Priority	Status
Adopt National TOMs (Themes, Outcomes and Measures) Framework 2019 for social value measurement	Selection of partner (Social Value Portal) to support development of Social Value delivery at SSDC	High	Complete. Social Value Portal now supporting this.
	Integration of Social Value into ProContract processes to support inclusion of SV targets in key tenders and allow tracking of delivery	High	Complete.
	Include SV guidance and examples in standard procurement guidance and/or tender templates	High	Ongoing. Bespoke to each tender.
Environmental objectives are described in procurement documents	Analysis of spend profile to identify potential opportunities to contribute to delivery of environmental targets, in coordination with environmental COP / Officers	High	Analysis Completed. Move to delivery in 2021.
Procurement support to Environmental programme of work	Support environment community of practice with delivery of specific tenders to influence environmental outcomes	Ongoing	Ongoing support to specific projects e.g. Public Sector Decarbonisation Scheme
	Develop a database solution to enable mapping of spend categories to carbon calculator, to baseline current carbon "costs of business" and track reductions	Medium	Needs to be scoped.
All tenders in targeted categories include a minimum 10% weighting on social value	Establish a minimum target for social value delivery, and stretch targets for specific high potential spend categories.	Medium	Complete, pending approval from council.

6.4.2 EMBED APPROACH TO SOCIAL VALUE: ENGAGING WITH SMES AND LOCAL BUSINESSES

Economy:

- Develop a reputation as a great place to do business.
- Ensure a greater proportion of our contracts are placed with local small to medium-sized enterprises.

The authority will look to maximise opportunities for local Small, Medium Enterprises (SME's), voluntary and community sector organisations and social enterprises to become our suppliers.

Outcome	Action	Priority	Status
Clear understanding of potential for local supply and SME engagement	Define realistic targets for (Primary) South Somerset District & (Secondary) 30 mile radius with Economic Development, by aligning spend categories with UK SIC 2007	High	Analysis Completed 2020.
Increase/ maintain percentage of local suppliers delivering our contracts	Quarterly Data coding of SSDC supplier database to identify locality and organization size to facilitate reporting	Ongoing	Complete and ongoing
Improve engagement with SMEs and local business	Ensure that when SSDC advertises a contract opportunity above or below the EU threshold, it is also advertised on the Contracts Finder website (CCS Guidance)	Ongoing	Complete and ongoing
	Widen the advertising of contract opportunities through such means as the Councils communication networks and social media	Ongoing	All contracts >£25k will be advertised via Procontract
	Improve prompt payment, by including a requirement for contracting authorities to include provision for 30-day payment terms that flow through the supply chain.(CCS Guidance)	Medium	Position to be reviewed.
	Develop "SME Friendly" Procurement Documents and associated simplified T&C's	Medium	To be developed
	Support and attend local business forums (with Economic Development team)	Medium	Not started

APPENDIX 1: TRANSPARENCY REQUIREMENTS

Information to be published quarterly

Expenditure exceeding £500

Local authorities must publish details of each individual item of expenditure that exceeds £500. This includes items of expenditure, consistent with Local Government Association guidance, such as: individual invoices / grant payments / expense payments / payments for goods and services / grants / grant in aid / rent credit notes over £500 / transactions with other public bodies.

For each individual item of expenditure, the following information must be published:

- date the expenditure was incurred
- local authority department which incurred the expenditure
- beneficiary
- summary of the purpose of the expenditure¹⁷
- amount¹⁸
- Value Added Tax that cannot be recovered, and
- merchant category (eg. computers, software etc).

Government Procurement Card transactions

Local authorities must publish details of every transaction on a Government Procurement Card. For each transaction, the following details must be published:

- date of the transaction
- local authority department which incurred the expenditure
- beneficiary
- amount
- Value Added Tax that cannot be recovered
- summary of the purpose of the expenditure, and
- merchant category (eg. computers, software etc).

Procurement information

- Local authorities must publish details of every invitation to tender for contracts to provide goods and/or services with a value that exceeds £5,000. For each invitation, the following details must be published:
 - reference number
 - title
 - description of the goods and/or services sought
 - start, end and review dates, and
 - local authority department responsible.
- It is recommended that local authorities place on Contracts Finder, as well as any other local portal, every invitation to tender or invitation to quote for contracts to provide goods and/or services with a value that exceeds £10,000. For each invitation, the details that should be published are the same as those set out above

CONTRACT REGISTER

Local authorities must also publish details of any contract, commissioned activity, purchase order, framework agreement and any other legally enforceable agreement with a value that exceeds £5,000. For each contract, the following details must be published:

- reference number
- title of agreement
- local authority department responsible
- description of the goods and/or services being provided

- supplier name and details
- sum to be paid over the length of the contract or the estimated annual spending or budget for the contract
- Value Added Tax that cannot be recovered
- start, end and review dates
- whether or not the contract was the result of an invitation to quote or a published invitation to tender, and
- whether or not the supplier is a small or medium sized enterprise and/or a voluntary or community sector organisation and where it is, provide the relevant registration number.

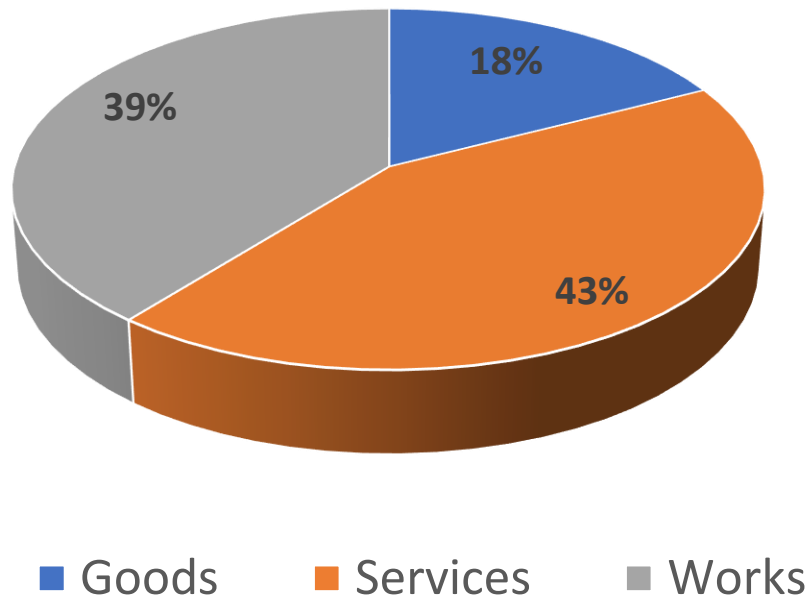
APPENDIX 2: SPEND DATA ANALYSIS

Please refer to the attached Appendix 2 Procurement Spend analysis 2020_21.

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Total spend 2020/21 Procurement

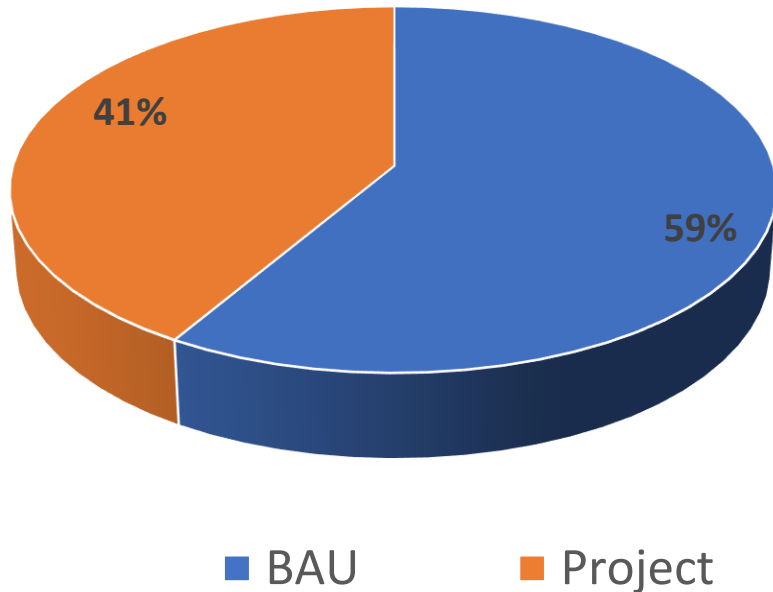
Procurement spend 2020/21



- In 2021 the total procurement spend for SSDC was £19,199 mil
 - £3,357 mil were spent on goods
 - £8,312 mil were spent on services
 - £7,529 mil were spent on works

Business as usual and projects

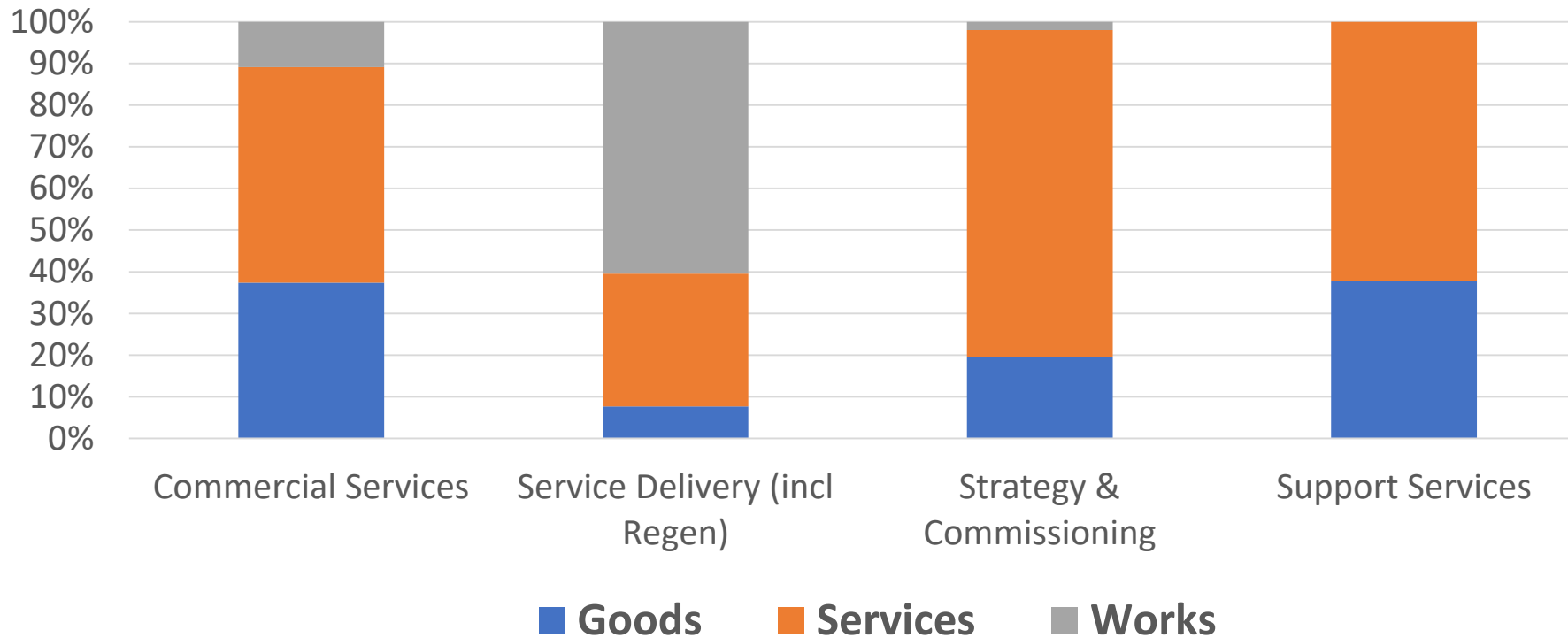
% BAU/Project spend



- 59% (£11,240 mil) of total spend was dedicated to BAU, while the remaining 41% (£7,958mil) were spent on projects
- Over 90% of project spend revolved around regeneration projects (Chard Regeneration design and construction, Wincanton survey, consultancy costs)

Goods, works, services spend by directorate

% goods, works, services by directorate

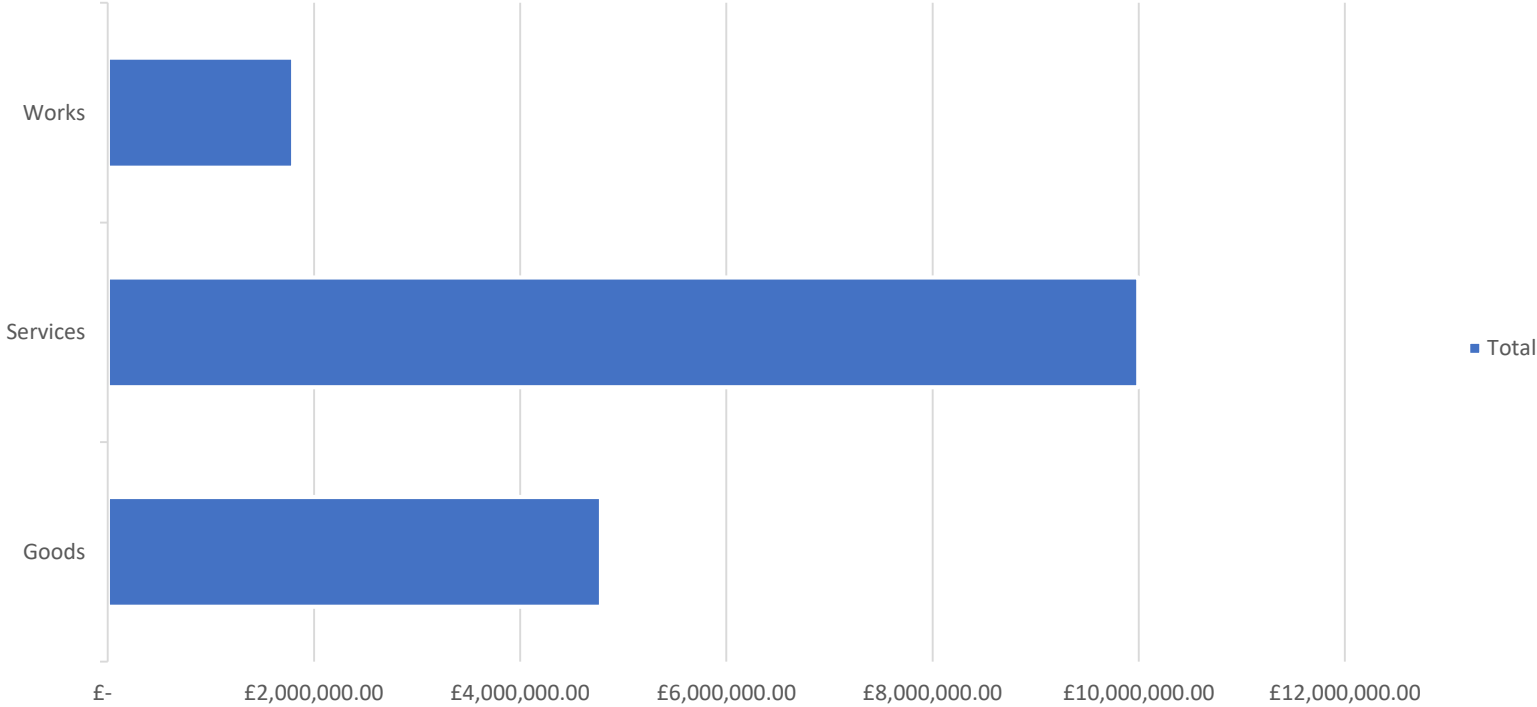


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	Goods	Services	Works
Commercial Services	£1,272,758.10	£1,761,367.59	£372,395.40
Service Delivery (incl Regen)	£906,037.45	£3,753,424.16	£7,115,440.54
Strategy & Commissioning	£362,318.93	£1,457,523.96	£37,333.98
Support Services	£815,604.68	£1,340,254.87	

Goods, works, services

Goods, works and Services, 2020



Top 10 Suppliers

Supplier	Description	Sum of Net Amount
Alliance Leisure Services Limited	Chard regeneration construction	£ 7,334,738.10
LED Leisure Management Ltd	Leisure service fee charges	£ 564,000.50
GMS Builders (Somerset) Ltd	Building and civil engineering	£ 497,200.48
The Oyster Partnership Ltd	Staffing and agency costs	£ 371,168.68
PA Consulting Services Ltd	Future Somerset programme consultancy	£ 295,000.00
EDF Energy	Electricity	£ 275,129.15
Bournemouth Churches Housing Association	Hostel and associated support	£ 267,935.85
Home Group Ltd	Rough sleeper outreach	£ 254,367.05
Glen Cleaning Company Ltd	Cleaning services	£ 225,826.67
Facultatieve Technologies Ltd	Cremulator and repairs	£ 219,673.43

Top 10 Suppliers - Goods

Supplier	Description	Sum of Net Amount
EDF Energy	Utilities – Electric	£ 275,129.15
Facultatieve Technologies Ltd	Crematorium supplies	£ 219,673.43
Box Software Ltd	Software licences	£ 154,761.73
Trustmarque Solutions Ltd	Software licences	£ 153,041.89
Northgate Public Services (UK) Ltd	Software licences	£ 127,591.16
Certas Energy UK Ltd	Fuel & Oil: Gas	£ 121,691.96
Total Gas and Power Limited	Fuel & Oil: Gas	£ 110,544.48
water2business	Utilities – Water	£ 90,410.73
RJ Hospitality Ltd (T/A Terrace Lodge H)	Facilities hire, incl catering	£ 89,879.16
Luciel Ltd		£ 83,725.00

Top 10 Suppliers - Services

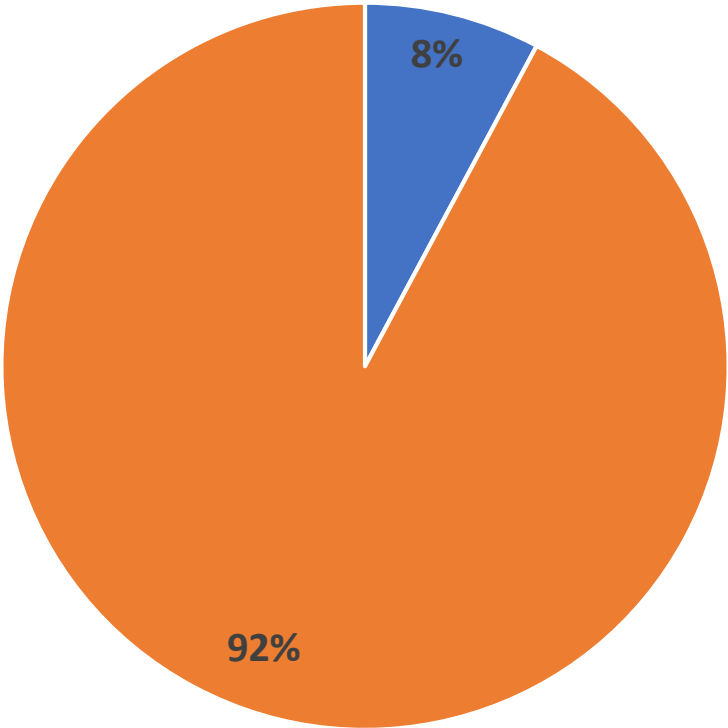
Supplier	Description	Sum of Net Amount
Alliance Leisure Services Limited	Chard regeneration construction	£ 968,472.94
LED Leisure Management Ltd	Leisure service fee charges	£ 564,000.50
The Oyster Partnership Ltd	Recruitment/staffing/agency	£ 371,168.68
PA Consulting Services Ltd	Management consultants	£ 295,000.00
Bournemouth Churches Housing Association	Social work with accommodation	£ 267,935.85
Home Group Ltd	Rough sleeper outreach	£ 254,367.05
Glen Cleaning Company Ltd	Cleaning services	£ 225,826.67
Park Avenue Recruitment Ltd	Recruitment/staffing/agency	£ 212,606.86
Marsh Ltd	Treasury, accounting, insurance	£ 180,276.56
Latcham Direct Limited	Print services	£ 163,858.02

Top 10 Suppliers - Works

Supplier	Description	Sum of Net Amount
Alliance Leisure Services Limited	Building and civil engineering	£ 6,366,265.16
CMS Builders (Somerset) Ltd	Building and civil engineering	£ 497,200.48
Page 145 G Fry & Son Ltd	Building and civil engineering	£ 148,986.45
Yarlington Property Management Limited	Building and civil engineering	£ 129,475.48
D N Ruddle Civil Engineering Ltd	Building and civil engineering	£ 115,356.66
Somerset Stairlifts & Mobility	Building and civil engineering	£ 93,853.00
D R Jones Yeovil Ltd	Building and civil engineering	£ 80,380.59
J W Crowther & Son Ltd	Building and civil engineering	£ 33,076.75
Elite Scaffolding SW Ltd	Building and civil engineering	£ 29,756.00
Simon Moore Engineering Ltd	Building and civil engineering	£ 8,741.21

SME & Local spend - SSDC

% SME & Local spend within SSDC postcodes

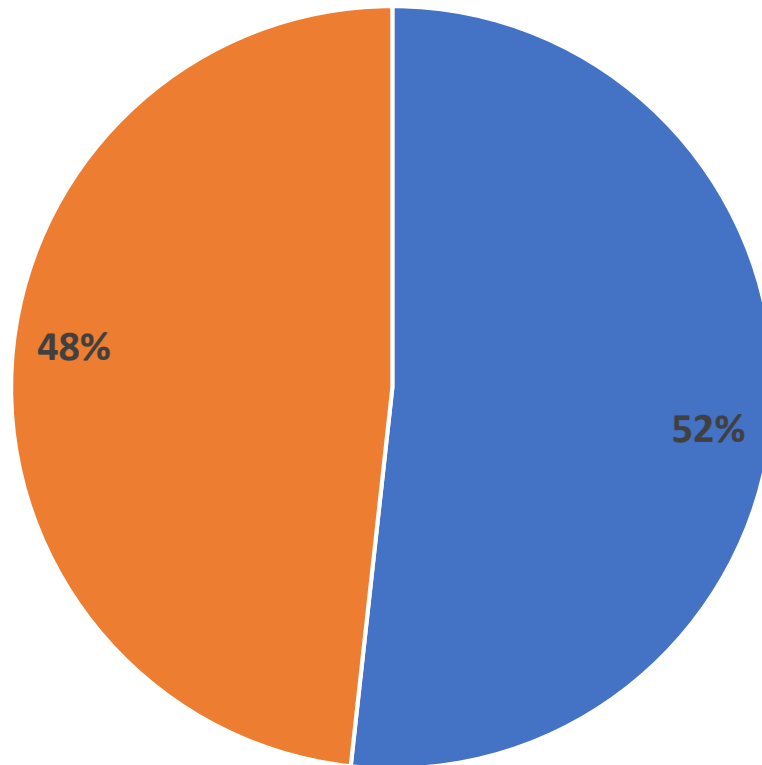


■ SME/SSDC postcodes ■ All other suppliers

- Total SME & Local spend in SSDC postcodes was £1,503 mil

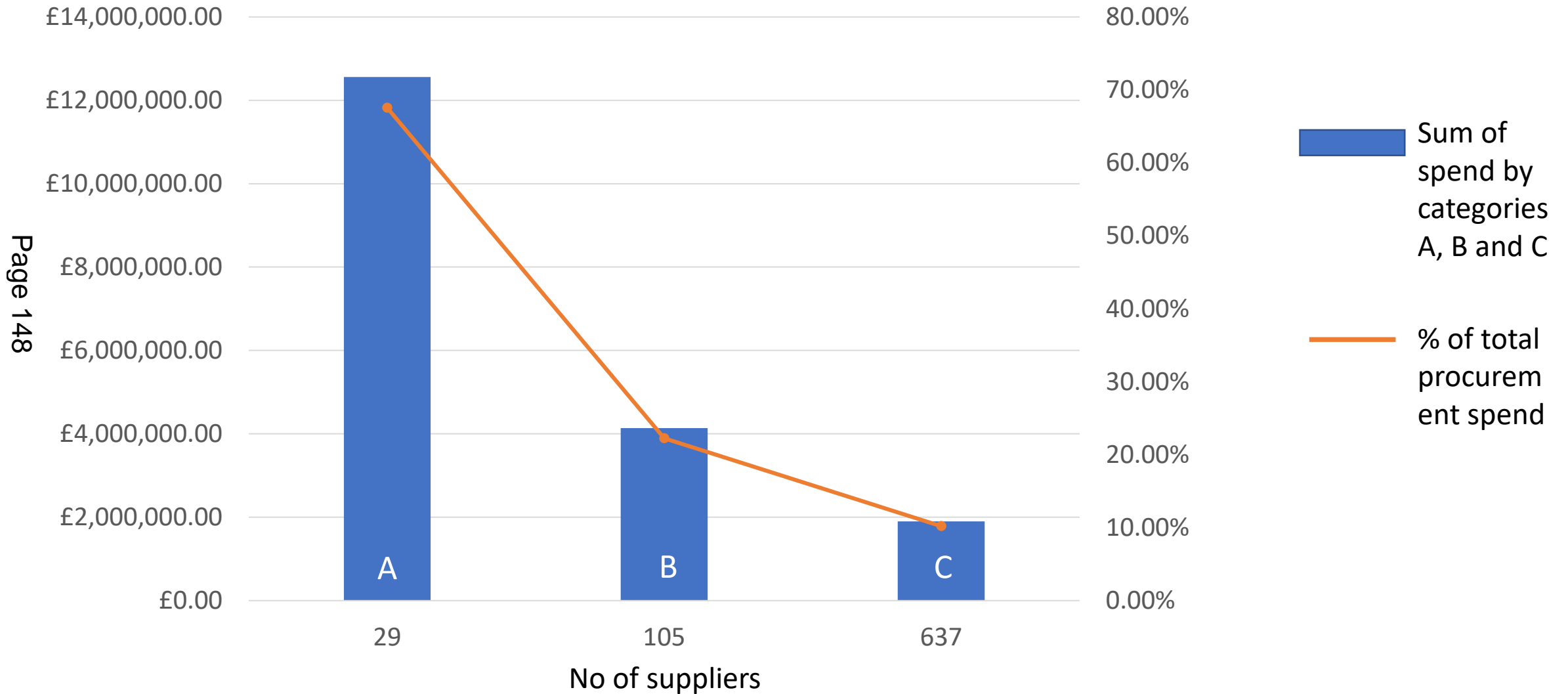
SME & Local spend – 30m radius

% SME & Local spend in 30 mile radius of Yeovil

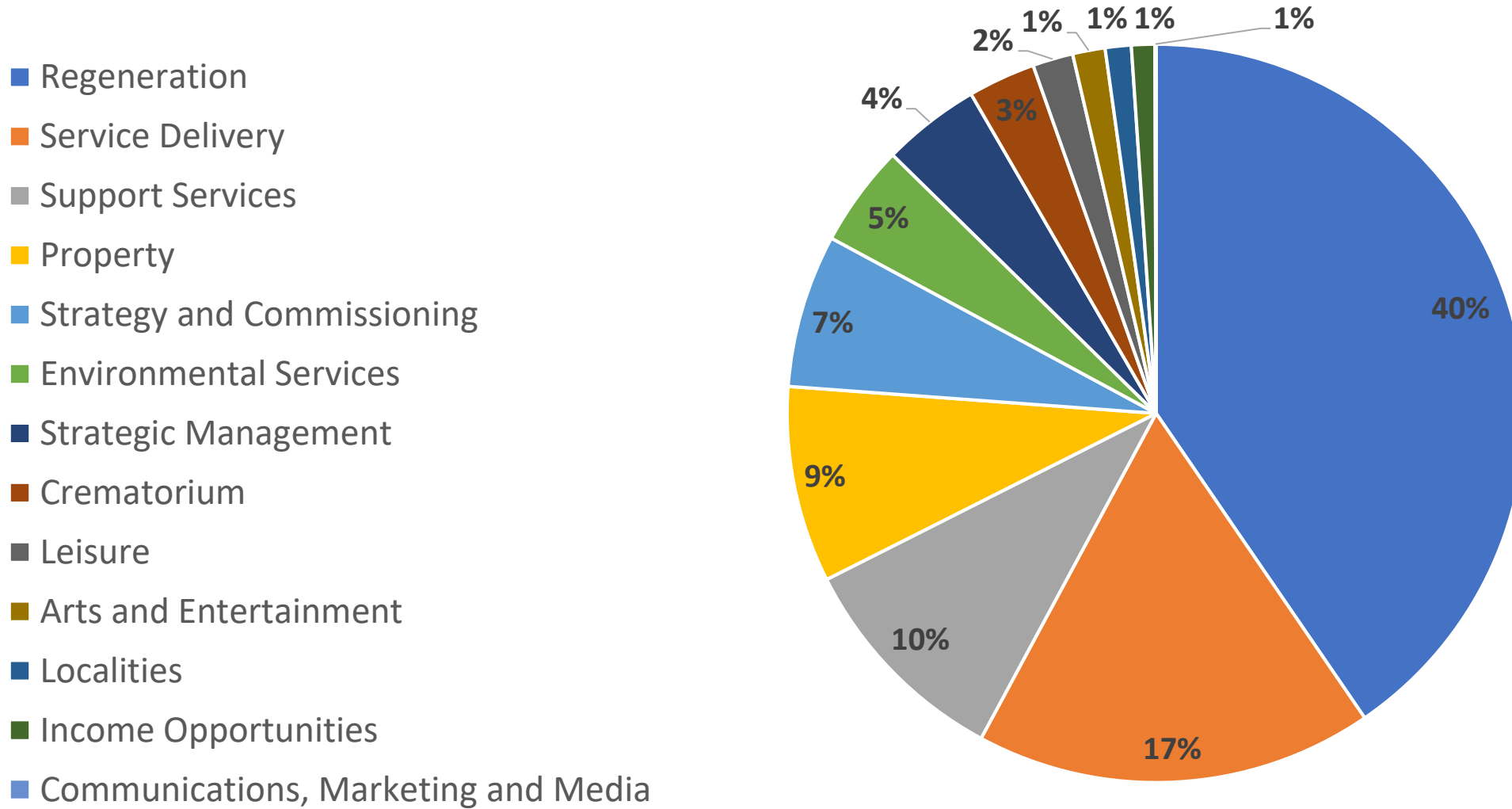


- Total SME & Local spend in 30 mile radius of Yeovil was £9,934, which equates to 52% of total spend.

Spend profile



Spend by department



% of total spend by department

Contract Procedure Rules (Contract Standing Orders)

Draft updated September 2021

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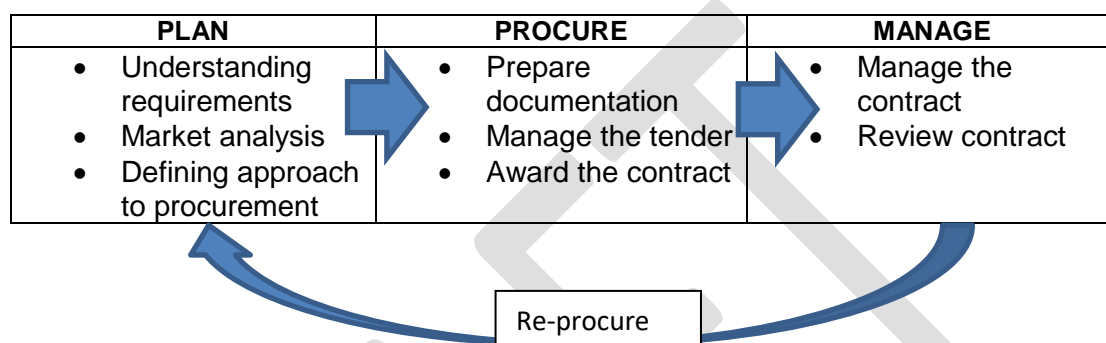
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1. Introduction and key principles

1.1 Introduction

1.1.1 These Contract Procedure Rules provide South Somerset District Council (SSDC) Officers and Councillors with the parameters and essential guidance to be followed throughout the Procurement lifecycle shown in Figure 1 below:

Figure 1 Stages of the Procurement Lifecycle



1.1.2 Key reference documents

Key reference documents to the Contract Procedure Rules are:

- SSDC Procurement Strategy 2020
- SSDC Social Value Policy
- SSDC Contract Management Framework.

1.2 Background

1.1.1 SSDC is obligated by S135 of the Local Government Act 1972 to make procedure rules to ensure competition and regulate the procurement process. This document sets out the Contract Procedure Rules (the “Rules”) that Officers at South Somerset District Council (SSDC) and consultants engaged in any capacity to manage or supervise the procurement of any goods, works or services for SSDC must follow when spending money to deliver our services to the people of South Somerset.

1.1.2 Observance of the Rules is mandatory and non-compliance with these Rules may constitute grounds for disciplinary action. The Procurement Specialist is responsible for monitoring and reporting on non-compliance and agreeing proportionate action with Officers (**Refer to Appendix 3 Monitoring Compliance with Contract Procedure Rules**).

1.1.3 The Rules have the following purpose:

- a) To ensure compliance with all legal requirements and to assist officers in achieving best practice;
- b) To ensure transparency, openness, non-discrimination and fair competition;
- c) Demonstrate probity, consistency, accountability and integrity;
- d) To achieve value for money;
- e) To protect the Council, Councillors and Officers from the risk of challenge, undue criticism or allegations of wrongdoing; and
- f) To support delivery of the SSDC's Procurement Strategy.

1.1.4 Where other general guidance provided to Officers appears to conflict with the Rules then the Rules have precedence. In any cases of doubt, advice must be sought in the first instance from the Procurement Specialist. The administration, monitoring and governance of the application of these Rules is the responsibility of the Section 151 Officer.

1.1.5 If there is any relevant change to English or International Law which affects these Rules, then that change must be observed until these Rules can be revised. Where there is a difference between these Rules and the current legislation, the legislation will prevail.

1.2 Compliance

1.2.1 Every contract entered into on behalf of SSDC must comply with:

- a) These Contract Procedure Rules;
- b) The Council's Financial Procedure Rules;
- c) All relevant English legislation;
- d) The Public Contract Regulations 2015 (PCR2015). These continue to apply until repealed and replaced following exit from the EU on 31 December 2020. The PCR2015 can be viewed at:

<https://www.legislation.gov.uk/uksi/2015/102/contents/made>

- e) The Concessions Contracts Regulations 2016 (CCR). The CCR2015 can be viewed at:

<https://www.legislation.gov.uk/uksi/2016/273/contents/made>

1.2.2 If there is any doubt about the application of the Rules, the issues should be referred in the first instance to the Procurement Specialist.

1.3 Application of the Rules

1.3.1 These Rules apply to:

- a) All contracts for the supply of goods, works or services to SSDC;
- b) Partnership and collaborative arrangements with other Local Authorities where the Council is not the Lead Authority. Assurance is to be sought that the Lead Authority is acting in compliance with its own Contract Procedure Rules; and
- c) Concession Contracts where the Council grants rights, land or property in return for services or for a particular use.

1.3.2 These Rules do not apply to:

- a) Contracts solely for the acquisition, disposal or transfer of any interest in land; or
- b) Contracts of employment that make an individual a direct employee of the Council.

1.4. Exemptions and waivers to these Rules (Refer to Paragraph 4.2 for process)

1.4.1 Under the Local Government Act 1972, Contract Procedure Rules made by a local authority with respect to contracts for the supply of goods or materials or for the execution of works shall include provision for securing competition for such contracts and for regulating the manner in which tenders are invited, but may exempt from any such provision contracts for a price below that specified in standing orders and may authorise the authority to exempt any contract from any such provision when the authority are satisfied that the exemption is justified by special circumstances.

1.4.2 The expectation is that the Procurement Procedure Rules will be followed. However, an automatic exemption may apply or a waiver to the requirements of the Contract Procedure Rules may be requested when PCR2015 rules for above threshold procurements do not apply. For Goods and Services, the PCR2015 threshold is £189,330 and it is £4,733,252 for Works contracts.

For further information on thresholds, please refer to Procurement Policy Note – New Thresholds 2020 (PPN 06/19) at:

<https://www.gov.uk/government/publications/procurement-policy-note-new-thresholds-2020>

1.4.2 Automatic exemption applies when:

- a) Goods, works or services procured in a genuinely unforeseeable emergency (e.g. natural disasters such as flooding or fires, immediate changes to legislation) because of a need to respond to events that were beyond the genuine control of the Council. Any such contract entered into by the Council must not be for a term of more than 6 months. It must be noted that not allowing sufficient time to tender will not be considered an emergency;

- b) Life or death – where there is a significant chance that the life or health of Officers, Councillors or the public will be put at real risk;

1.4.3 A waiver to the Rules may be requested where one or more of the following circumstances apply:

- a) Legal services falling within Regulation 10(1)(d) of the Public Contracts Regulations 2015;
- b) Dealings in the money market or obtaining finance within Regulation 10(1)(e) and 10(1)(f);
- c) Purchases at auction or at public fairs or markets;
- d) Contracts falling within the Light Touch Regime for services listed in Schedule 3 of the PCR2015;
- e) Goods or materials are proprietary items or are sold only at a fixed price and no satisfactory alternative is available;
- f) Contracts for the execution of mandatory works by statutory undertakers, such as utilities providers;
- g) Goods or Services where the Council's needs are only capable of being met by one supplier and where the contract assists the Council in meeting its statutory duties;
- h) Where a contract for the execution of works or the undertaking of services or the supply of goods involves highly specialised technical, scientific or artistic knowledge such that it is not possible to achieve competitive tenders;
- i) Where the work to be executed or the goods or materials to be supplied consists of repairs to or the supply of parts for existing machinery or plant or are additions to an existing style or design which would involve the council in greater cost and additional work in trying to harmonise two differing systems, designs or solutions;
- j) Where waiving the application of the Rules would be in the interests of the efficient management of SSDC services (i.e. where the Council would incur avoidable cost or reduced income by not waiving the application of the Rules);
- k) Limited markets – supply of the product or service is demonstrably restricted to a single source of supply;
- l) Where under specific one-off project conditions it is demonstrated that Value for Money is to be achieved by approaching one supplier to deliver goods, works or services within well-defined parameters; or,
- m) Other unforeseen circumstances or specific project conditions that would result in unacceptable commercial and/or reputational impact.

1.4.4 Above PCR2015 threshold exemptions

a) Teckal exemption

Some contracts above the PCR2015 threshold may be subject to a Teckal exemption. This applies in circumstances where SSDC awards contracts for providing services or works to an organisation considered to be equivalent to an 'in-house' provider. The Teckal exemption is subject to strict legal tests regarding whether a proposed supplier is to be regarded as an 'in-house' provider.

b) Inter-Authority co-operation

Where Local Authorities and Public Bodies work together to jointly discharge their shared responsibilities to deliver public services, as opposed to one public body acting as the other's service provider.

c) Trading companies

Where a Local Authority sets up a trading company, the specific structure of that trading company will determine whether the PCR2015 apply or not. In the first instance advice should be sought from the Procurement Specialist.

Procurement framework

2.1 The Procurement Cycle

The Contract Procedure Rules and all associated guidance is organised to support Officers in managing the three stage of the procurement cycle as shown in [Figure 1](#): Plan, Procure and Manage.

2.2 Procurement Framework

SSDC has created a Procurement Framework based on four contract bands according to the value of the goods, works or services being procured. These are shown in Table 1 below:

Table 1: SSDC Procurement Framework

Contract band description	Goods and Services estimated value limit	Works estimated value limit	Summary requirement	Authority to recommend procurement
Very low value	£0 - £5,000	£0 - £10,000	At least one written quotation Anyone with procurement	Procuring Officer: Anyone with the required procurement

			<p>responsibility must operate in accordance with Financial Procedure Rules.</p> <p>Any purchase in excess in excess of £500 must have a Purchase Order raised.</p>	<p>responsibility and competency.</p> <p>Approval by an authorised signatory.</p>
Low value	£5,001 - £25,000	£10,001 - £25,000	<p>A minimum of three written quotations</p> <p>Application of waiver may be applied through appropriate approval route. Anyone with procurement responsibility must operate in accordance with Financial Procedure Rules.</p> <p>Any purchase in excess in excess of £500 must have a Purchase Order raised.</p>	<p>Anyone with the required procurement responsibility and competency</p> <p>Approval by an authorised signatory under Financial Procedure Rules.</p>
Medium value	£25,001 – PCR2015 threshold (£189,330)	£25,001 – PCR2015 threshold (£4,733,252)	<p>Default position is Request for Quotations or ITT using standard documentation via e-tendering system to select list or on an open basis subject to supply market conditions.</p>	<p>Anyone with the required procurement responsibility and competency.</p> <p>Approval by an authorised signatory under Financial</p>

			Application of waiver may be applied through appropriate approval route.	Procedure Rules.
High value	>PCR2015 threshold (£189,330)	>PCR2015 threshold (£4,733,252)	ITT using e-tendering system following PCR2015 rules and regulations	Anyone with the required procurement responsibility and competency. Approval by an authorised signatory under Financial Procedure Rules.

2.2 Identifying the right procurement procedure

2.2.1 The following process steps should be followed:

1. You have a requirement
2. Can it be met from an existing resource or contract?
3. What are the key outcomes sought?
4. What is the estimated value of the contract (annual price x duration)?
5. Is it for goods, services or works?
6. Identify the right procedure to follow, depending on the value, complexity and risk.

2.2.2 Appendices 1a and 1b provide a summary of procedure selection.

3. Officer Responsibilities

Table 2 Officer Responsibility matrix

Officer	Plan Stage	Procure Stage	Manage Stage
---------	------------	---------------	--------------

<p>Procuring Officer (including Lead Specialist and Director of Service Area)</p>	<p>Approve procurement commencement and confirm budget</p> <p>Understand what is required</p> <p>Explore supplier market</p> <p>Consider best approach to market, consulting with Procurement Specialist as necessary</p> <p>Consider contract management requirements at planning stage</p>	<p>Write the specification</p> <p>With support of procurement, develop the tender documentation</p> <p>Evaluate and identify preferred supplier in accordance with the Procurement Procedure</p> <p>Arrange for contract signing</p> <p>Prepare mobilisation plan</p>	<p>Implement Contract Management approach as defined at Planning Stage and in accordance with the Contract Management Framework</p>
<p>Procurement Specialist and/or Procurement Business Partners</p>	<p>Support Procuring Officer in defining the most appropriate approach to the market</p>	<p>Support Procuring Officer to produce tender documentation</p> <p>Oversee the tender process</p>	<p>Support contract mobilisation as required</p> <p>Monitor compliance with the Rules</p>
<p>Monitoring Officer</p>	<p>Support any contract planning</p>	<p>Provide advice on contract clarifications</p>	<p>Agree contractual terms in more complex cases</p>
<p>Section 151</p>	<p>Have oversight of budget requirements for high value procurements</p>	<p>Provide Finance support on evaluation (as required)</p>	<p>Approve budget commitment for high value procurements</p>

3.1. Conflicts of Interest

3.1.1 Members of staff must avoid any conflict between their own interests and the interests of the Council. This is a requirement of the Council's Code of Conduct for Officers and includes:

- a) Not accepting gifts or hospitality from organisations or suppliers that the Council has dealings with;
- b) Not working for organisations or suppliers that the Council has dealings with;
- c) Notifying the Procurement Specialist in writing if an Officer has links with an organisation or supplier who is tendering or quoting for a contract with the Council or already has a contract with the Council (for example, where a family member or close friend works for the organisation).

3.1.2 All consultants engaged to act on behalf of the Council must declare that they will avoid any conflict between their own interests or those of any of their other clients and the interests of the Council.

3.1.3 If a Councillor or a member of staff has an interest (direct or indirect), financial, otherwise, in a contract or proposed contract, he/she must declare it in writing to the Monitoring Officer as soon as he/she becomes aware of the interest. A Councillor or member of staff who has an interest in a contract must not take part in the procurement or management of that contract.

3.1.4 The Monitoring Officer must maintain a record of all declarations of interest notified by Councillors and Officers.

3.2 Prevention of Bribery and Corruption

3.2.1 A contract may be terminated immediately and any losses to SSDC arising from the termination recovered from the supplier, if the supplier, or anyone acting on his behalf (with or without the supplier's knowledge), offers or promises or gives a financial or other advantage to a Councillor, any member of staff, or any consultant in connection with the contract.

3.2.2 Any Councillor, member of staff or consultant who becomes aware or has reason to believe that a supplier or potential supplier has committed fraud, bribery or corruption, must report it to the Monitoring Officer.

3.3 Relevant Legislation

3.3.1 For the purposes of these Contract Procedure Rules, Relevant Legislation is defined as the following legislation:

- a) Public Contracts Regulations 2015 (PCR 2015);
- b) Concession Contracts Regulations 2016 (CCR 2016);
- c) Localism Act 2011;
- d) Public Services (Social Value) Act 2012;
- e) Freedom of Information Act 2000;
- f) General Data Protection Regulation (GDPR) and the Data Protection Act 2018;
- g) Equality Act 2010;
- h) Modern Slavery Act 2015;
- i) Transfer of Undertakings (Protection of Employment) Regulations 2006;
- j) Any industry or sector-specific legislation pertaining to the subject matter of the Contract.
- k) The following SSDC policy areas:

Whistleblowing policy (SSDC)
Conflict of Interest Declaration (SSDC)
Communications Policy (including restrictions and joint Communications) - SSDC
Anti-Bribery Policy (SSDC)
Data Retention Policy (SSDC)
Safeguarding Policy (SSDC)
Complaints Policy (SSDC)
Environmental Policy (SSDC)
Business Continuity Planning (Policy / Framework) (SSDC)
Prompt Payment Scheme (Public Sector)
Data Security Policy (SSDC)
Data Protection Policy (SSDC)

Public Sector Equalities Duty (Legal Requirement)
Equalities Policy (SSDC)
Health & Safety Policy (SSDC)
Employment Law
Compliance Statement on Living / Minimum Wage (SSDC)

3.3.2 The Procuring Officer should be aware that the Relevant Legislation may operate to dictate the method of procurement and the content of any related contract.

3.3.3 When planning and preparing all procurement and contracting activities the Procuring Officer shall have regard to the Relevant Legislation and seek advice from the Procurement Specialist where necessary to ensure that any applicable Relevant Legislation has been complied with.

3.3.4 Procurement activity in SSDC is devolved to individual Service Directors, who are supported in their purchasing activities by the Procurement Specialist, Case Officers, other SSDC Specialists as relevant and the Monitoring Officer.

3.3.5 Each Director must ensure that Officers within their service area having responsibility for procuring contracts (the Responsible Officer(s)) have received adequate training on the role and are aware of and follow the Rules and guidance when letting contracts.

4 Plan stage - defining the procurement

4.1 Authority to proceed

4.1.1 Before commencing any procurement, the Procuring Officer must ensure that the appropriate authority to proceed is in place in accordance with the [Procurement Framework](#) for the contract given its value, strategic importance and potential risks to SSDC. Appropriate business approval is to be sought by the Procuring Officer and the required budget confirmed in advance of any procurement exercise.

4.2 Automatic exemptions or Waivers

4.2.1 Automatic exemptions or waivers may be applied in accordance with paragraph 4.1 of the Contract Procedure Rules.

4.2.2 The Procurement Specialist is responsible for maintaining a register of procurement waivers and ensuring all waivers awarded are reported to the Monitoring Officer on a quarterly basis.

- 4.2.3 For contracts less than £25,000, the Procuring Officer must complete the relevant Waiver Request Form (See Appendix 2 for content) and seek the approval of the Procurement Specialist and the relevant Lead Specialist.
- 4.2.4 For contracts at and above £25,000 and below PCR2015 Threshold, the Procuring Officer must complete the relevant waiver request form and seek the approval of the Procurement Specialist and the relevant Service Director.
- 4.2.5 The Procuring Officer is responsible for ensuring that the waiver request forms are duly completed and signed prior to the award of a contract.
- 4.2.6 No waiver will be granted for contracts over The PCR2015 Threshold unless expressly permitted by the Director of Strategy and Commissioning and the Monitoring Officer and in accordance with 'above threshold' exemptions.
- 4.2.7 Regardless of whether a waiver has been sought, the necessary authorisations to procure, award, amend or sign a contract must also be obtained.

4.3 Early Market Engagement

- 4.3.1 Officers may, prior to commencing the procurement process and on the advice of the Procurement Specialist, consult potential suppliers in general terms about the nature, level and standard of the supply and seek market views and intelligence that can be used in the planning and conduct of the procurement process.

4.4 Estimating the Contract Value

- 4.4.1 The value of a contract is the total amount that the Council expects to pay for the contract over its expected lifetime, including any additional options, lots, renewals and/or extensions. The value used should be exclusive of VAT.
- 4.4.2 Where the contract period is indefinite or uncertain, the value must be calculated on the basis that the contract will be for a period of 48 months.
- 4.4.3 Contracts must not be packaged or divided into smaller units for the purpose of creating lower value contracts to avoid any provision of these Rules or the PCR2015 (disaggregation). When tendering, consideration must be given to the extent to which it is appropriate to divide the contract into lots to facilitate opportunities for local suppliers, small and medium sized enterprises and voluntary organisations.
- 4.4.4 The repeat direct award of contracts or purchase orders for the same or similar services, whatever the value of the individual contracts/purchase orders, to the same supplier will, for the purposes of determining the aggregated contract value and the application of these Rules, be regarded as extensions to a single

contract. Rolling contracts are subject to evidence of benchmarking requirements to ensure continued value for money and form part of spot checks by Procurement Specialist.

4.5 Use of Framework Agreements

4.5.1 The Procurement Specialist is responsible for maintaining a register of Framework Agreements that SSDC has access to.

4.5.2 The use of framework agreements is permitted for any value of contract. The Procurement Specialist must be consulted, and confirmation given that the Council may lawfully access the framework before a purchase. The relevant Director must be informed of SSDC access to a Framework Agreement.

4.5.2 In order to select a supplier for a call-off contract under a multi-supplier Framework Agreement, or to conduct a mini competition, the Procuring Officer must follow the procedure set out in that Framework Agreement.

4.5.3 The Procuring Officer may make a direct award under a Framework Agreement when its call-off procedures allow and the call-off must be in accordance with the Framework procedures for award.

4.6 Insurances

4.6.1 It is the responsibility of the Procuring Officer, in consultation with the Procurement Specialist to set, where appropriate, adequate levels of insurance for every procurement.

4.6.2 The Procuring Officer must ensure that any insurance required by the Council is held by the provider with a reputable insurance company and that the policy/s are renewed as necessary during the contract period.

4.7 TUPE

4.7.1 Where relevant, the Procuring Officer must consider the implications of the Transfer of Undertakings (Protection of Employment) Regulations 2006 as amended and consult with the Procurement Specialist as to their application to the specific procurement.

4.8 Performance Bond

4.8.1 The Procuring Officer must consult the Procurement Specialist and Section 151 Officer concerning whether a performance bond or a deposited sum is needed where:

- a) The contract is for construction and the value of the contract is in excess of £500,000; or

- b) The contract value is above £1,000,000; or
- c) Where it is proposed to make stage or other payments in advance of receiving the whole of the contract and there is a concern about the stability of the candidate.
- d) For any value contract where the risk presented to SSDC is significant e.g. reputational.

4.9 Parent Company Guarantee (PCG)

4.9.1 The Procuring Officer must consult the Procurement Specialist and Section 151 Officer concerning whether a parent company guarantee is needed where:

- a) The Total Contract Value exceeds the PCR2015 Threshold; or
- b) The award of the contract is based on the evaluation of the parent company or there is some concern about the stability of the supplier.

4.10 Collateral Warranty

4.10.1 The Procuring Officer must consult the Procurement Specialist and Monitoring Officer concerning whether under specific contract conditions a collateral warranty is needed whereby an agreement needs to be put in place with a third party outside of the primary contract.

4.11 Environmental sustainability

4.11.1 In accordance with the SSDC Procurement Strategy and the SSDC Social Value Policy, the Procuring Officer must consider how to incorporate the principles of sustainability into each procurement. The Procurement Specialist can provide support in this subject area.

4.12 Social Value

4.12.1 In accordance with the Social Value Act 2012, SSDC Procurement Strategy and the **SSDC Social Value Policy** the Procuring Officer must consider how the procurement might improve the economic, social and environmental well-being of the area. The Procurement Specialist can provide support in this subject area.

4.13 Equality and diversity

4.13.1 In accordance with the **SSDC Procurement Strategy** and the **Equality Act 2010**, the Procuring Officer must have due regard to the public sector equality duty. All suppliers will be expected to comply with Equality legislation to deliver contracts fairly and without unlawful discrimination.

4.14 Value for money

4.14.1 The Procuring Officer must consider the criteria required to determine what represents value for money for the given contract. This must be defined before commencing a procurement. The Procurement Specialist can provide support in this subject area.

4.15 Form of Contract

4.15.1 All contracts, regardless of value, will be accompanied either by the Council's:

- a) Relevant Standard Terms and Conditions of contract; or,
- b) A standard form of contract; or,
- c) Bespoke terms.

4.15.2 Further guidance regarding the contract terms to be included in SSDC contracts can be sought from the Monitoring Officer.

4.15.3 All Contracts are to be executed in accordance with these Contract Procedure Rules.

5. Procure stage – managing the procurement

Before commencing any procurement, the Procuring Officer must complete all the planning identified in Section 4 of these Contract Procedure Rules as required relative to the value, strategic importance and risk to SSDC presented by the requirement.

5.1 Procurements below the PCR2015 threshold value (£189,330 for Goods and Services and £4,733,252 for Works

(The EU thresholds introduced on 1 January 2020, and detailed above, will remain in place until 1 January 2022. Future thresholds will be determined by the World Trade Organisation's (WTO) Government Procurement Agreement (GPA) – which the UK has been a member of since 1 January 2021.)

5.1.1 For procurements with a Total Contract Value below the PCR2015 Threshold, the Procuring Officer must act in accordance with SSDC procedural guidance.

5.2 Procurements above the PCR2015 threshold value

5.2.1 For procurements with a Total Contract Value in excess of the PCR2015 Threshold, the Procuring Officer must consult with the Procurement Specialist to develop the procurement sourcing strategy.

5.3 Specification of SSDC requirements

5.3.1 Each procurement must be appropriately specified, using early market engagement as required.

5.3.2 The specification must be a clear and comprehensive description of SSDC's requirements and should incorporate measurable and, so far as is possible, objective quality and performance criteria to enable a proper assessment to be made of the supplier's ability to meet SSDC's requirements. The Specification standard template provides guidance on this.

5.3.3 Selection and Award criteria, aligned to the specification of requirements, must be agreed in advance of inviting expressions of interest to ensure SSDC obtains value for money and the procurement process is transparent.

5.4 Standard Procurement Documents

5.4.1 The Procuring Officer must use standard SSDC Procurement Documents obtained from the Procurement Specialist, where the value of the contract is above £25,000 and an SSDC tender procedure is used.

5.4.2 If a Framework Agreement or a Dynamic Purchasing System (DPS) is used, the Procuring Officer must use the relevant Framework Agreement or Dynamic Purchasing System documents if required.

5.4.3 Where it is necessary to vary the documents at 5.4.1 or 5.4.2, the Procuring Officer must consult with the Procurement Specialist or the external Framework Manager as appropriate.

5.5 Overview of the Procurement Procedure Framework for SSDC and PCR2015 financial thresholds

5.5.1 The procedure to be adopted is determined by the lifetime value of the specific contract.

5.5.2 The procedure must be robust, yet proportionate to the value of the contract.

5.5.3 The relevant financial thresholds and the applicable procedures are set out in Appendix 1 to these Contract Procedure Rules.

5.5.4 Use of SSDC's Electronic Tendering System

Where a contract value estimate is in excess of £25,000, the following requirements apply:

- a) SSDC's Electronic Tendering System must be used where an SSDC procedure is run. This can be for selected suppliers or via an open tender competition, depending on the specific supply market. Officers should refer to the Procurement Specialist for further information on this.
- b) A Contracts Finder Notice must be published if an open tender competition is used.

5.6. The Procurement Procedures relative to financial thresholds

5.6.1 The following is applicable to each procedure:

- a) Where there is a suitable Framework Agreement, Dynamic Purchasing System or Corporate Contractual Arrangement approved by the Procurement Specialist, that Framework Agreement, Dynamic Purchasing System or Corporate Contractual Arrangement will be used, provided that such a course of action achieves the principles of Value for Money;
- b) Where acceptance of a quote or tender is made by the issuing of a Purchasing Order, the Purchase Order must refer to the Council's Standard Terms and Conditions of Contract, except for where the complexity of the contract requires more bespoke terms, in which case the Purchase Order will make separate reference to these;
- c) Unless otherwise specified in these Rules, unsuccessful suppliers will be notified and, at their request, will be given the reason why they were unsuccessful without breaching the commercial confidentiality of other candidates.

5.7 Process for Low Value Purchases

5.7.1 For contracts up to and including the Total Contract Value of £5,000 (goods and services), or £10,000 (works), the Procuring Officer is required to achieve a minimum of one written quotation to demonstrate compliance. Where compliance with the principle of Value for Money cannot be demonstrated by seeking one written quotation, the Procuring Officer will seek more than one quote.

5.7.2 Compliance with the principle of Value for Money will be demonstrated by evidence of value for money considerations in the decision and a demonstrable conclusion that a better value outcome is unlikely to be achieved without a disproportionate application of further resource in the process.

5.7.3 The Procuring Officer may choose to either:

- a) Place an order with the selected supplier on the basis of a pre-quoted price (such as in a supplier's catalogue), having satisfied themselves that the price to be paid represents Value for Money; or
- b) Select a minimum of one potential supplier to be invited to submit a quotation.

5.7.5 Where the Procuring Officer is unable to select a potential supplier and/or demonstrate Value for Money, the procedure set out at paragraph 5.8 (Quotations) must be followed.

5.7.6 Acceptance will be notified to the successful supplier by issue of a Purchase Order.

5.7.7 The Procuring Officer must document their decision-making process to demonstrate compliance with this section.

5.8 Process Requiring Quotations

5.8.1 For contracts with a Total Contract Value of more than £5,000 (£10,000 for works) but less than £25,000, the Procuring Officer is required to achieve a minimum of 3 quotations.

5.8.2 Compliance with the principle of Value for Money will be demonstrated by evidence of value for money considerations in the decision and a demonstrable conclusion that a better value outcome is unlikely to be achieved without a disproportionate application of further resource in the process.

5.8.3 Where compliance with the principle of Value for Money cannot be demonstrated by seeking 3 written quotations, the Procuring Officer shall seek more than 3 quotations and, if considered necessary, run an open tender competition.

5.8.4 A Purchase Order must be raised.

5.8.5 A Contract Award Record must be made on SSDC's Contracts Register where the contract value is over £5,000.

5.9. Procurement Procedures (value above £25k) Requiring Publication on ProContract

5.9.1 Procedures with a Total Contract Value above £25,000 and below the PCR2015 Thresholds must be published via ProContract when openly advertised. SSDC Standard Tender Documents must be used and the Procuring Officer must seek the advice of the Procurement Specialist.

5.9.2 The Procuring Officer is required to invite tenders from any and all qualified candidates by advertising the opportunity via the Council's Electronic Tendering System and in Contracts Finder. Where an Approved Selection List or a selected list

of contractors is used because of the nature of the supply market, the Procuring Officer must seek at least 3 confirmed expressions of interest.

5.9.3 An Invitation to Tender will be sent to all parties who have expressed an interest.

5.9.4 The successful supplier and unsuccessful suppliers will be notified of the outcome by issue of a letter sent electronically via the Council's Electronic Tendering System.

5.9.5 A Purchase Order must be raised.

5.9.6 A Contract Award Record must be made on the Council's Contracts Register, and in Contracts Finder when openly advertised.

5.10 Procurement Processes for Contracts of a Value Over the PCR2105 Threshold

5.10.1 The Lead Specialist must obtain approval from the Procurement Specialist before beginning a procurement exercise in respect of any contract at and above the relevant PCR2015 Threshold.

5.10.2 For contracts at and above the relevant PCR2015 Threshold, the Procuring Officer is required to invite tenders from any and all qualified suppliers by advertising the opportunity via SSDC's Electronic Tendering System, in Contracts Finder and in the Find a Tender Service.

5.10.3 A statutory minimum period of advertising will apply which will vary depending on the procedure used (**refer to Regulation 47 of PCR2015**).

5.10.4 In most cases, the Open Procedure, Restricted Procedure or Competitive Procedure with Negotiation will be used, however, the advice on the appropriate route to procurement must be sought from the Procurement Specialist.

5.10.5 The successful supplier and unsuccessful suppliers will be notified in accordance with the Relevant Legislation and a Standstill Period of a minimum of 10 calendar days will be observed.

5.10.6 A Purchase Order must be raised.

5.10.7 A Contract Award Record must be made on SSDC's Contracts Register, in Contracts Finder and in Find a Tender (or elsewhere in accordance with International Legislation).

5.11 Confidentiality of Tenders and Quotations

5.11.1 All matters concerned with quotations and tenders must be treated as confidential, and any information, discussion or correspondence entered into should

be confined to those officers of, or consultants to the Council who are directly concerned.

5.11.2 The amount or value of any tender or quotation which is to be considered by the Council or Executive must not be made public before the meeting and must be omitted from any written report on the subject which may be circulated before the meeting unless the report is marked as confidential.

5.12 Submission, Receipt and Opening of Tenders

5.12.1 For Quotation procedures relating to low value contracts below £25,000 (where use of the Electronic Tendering System is discretionary), the Procuring Officer must record the names of suppliers who submitted a quotation within the deadline provided and the value of the quotation. A record of how value for money has been achieved through the Quotation procedure must be kept. These records must be made available to the Procurement Specialist on request.

5.12.2 Contracts above £25,000

- a) All openly advertised Contracts at and above the Total Contract Value of £25,000 will be submitted electronically through SSDC's Electronic Tendering System (refer to paragraph 5.9);
- b) Submissions will be verified and opened on SSDC's Electronic Tendering System.
- c) Tenders received after the stated date and time must not be accepted, unless there are extenuating circumstances that can be confirmed via the ProContract portal provider and that there is a high level of confidence that it is not a fraudulent act. The Procurement team must agree with any decision to accept a tender and approval of the Monitoring Officer should be sought. For the purposes of these Rules the time will be deemed to be at the first stroke, e.g. noon will be 12:00:00;

5.13 Contract Selection and Award Criteria

5.13.1 The Selection Questionnaire shall be used to assess a supplier's ability to meet SSDC's requirements or minimum standards of suitability, capability, legal status or financial standing.

5.13.2 For all Contracts over the Total Value of £25,000 the Officer will include the Selection Questionnaire within the Procurement Documents. For works contracts the Procuring Officer should seek guidance from the Procurement Specialist in respect of the correct use of Selection Questionnaires.

5.13.3 The Award Criteria will be used to assess a supplier's ability to deliver SSDC's requirements under the Contract, achieving Value for Money through the agreed balance of Price and Quality criteria (Note: referred to as Most Economically Advantageous Tender or MEAT in PCR2015. The Government Green Paper: Transforming public procurement proposes changing the basis of contract awards from MEAT to MAT, Most Advantageous Tender. In practice there is already good opportunity to take non-financial considerations into account in procurement).

5.13.4 The Contract will be awarded to the supplier whose tender best meets the Award Criteria (as set out in the Procurement Documents).

5.13.5 The Procuring Officer will consult with the Procurement Specialist for guidance on the Selection and Award criteria prior to issuing the Procurement Documents.

5.14 Intention to Award a Contract

5.14.1 For contracts with a Total Contract Value below the PCR2015 Threshold, the Procuring Officer should allow candidates a discretionary minimum Standstill Period of 10 calendar days before entering into a contractually binding agreement with the successful supplier(s). It is most important that any communication with the preferred candidate(s) does not constitute a Contract award, conditional or otherwise.

5.14.2 For contracts with a Total Contract Value over the PCR2015 Threshold, the Procuring Officer must allow candidates a mandatory minimum Standstill Period of 10 calendar days before entering into a contractually binding agreement with the successful supplier(s). It is most important that any communication with the preferred candidate(s) does not constitute a Contract award, conditional or otherwise.

5.14.3 Following any Standstill Period and the signing of a contract, an Award Notice must be placed as delegated by the Procurement Specialist.

5.14.4 All suppliers must be simultaneously notified in writing of the award and all letters informing them of the outcome of the Tender must comply with the Relevant Legislation.

5.14.5 Should any further communication with the suppliers be requested/required, advice should be sought by the Procurement Specialist prior to any such communication.

5.14.6 Any complaints, correspondence threatening challenge or formal court proceedings challenging the decision must be immediately submitted to the Procurement Specialist and the Monitoring Officer.

6. Authorisations

6.1 Authority to Procure a Contract

6.1.1 Lead Specialists or a Director may authorise a procurement exercise in respect of contracts of any value so long as:

- a) The decision to procure a contract is not a Key Decision;
- b) The procurement relates to their service area and in accordance with relevant authority;
- c) In doing so they are acting in accordance with the Financial Procedure Rules; and,
- d) Where the contract value is above the relevant PCR2015 Threshold, the approval of the Procurement Specialist has been obtained.

6.2 Authority to Award or Amend a Contract

6.2.1 Approval to award or amend a contract, Framework Agreement or Dynamic Purchasing System can only be given as set out in Financial Procedure Rules.

6.2.2 In respect of contract amendments, the Total Contract Value is the total value of the contract plus the value of any proposed amendment.

6.3 Authority to Sign a Contract

6.3.1 The Chief Executive, Section 151 Officer and Monitoring Officer may sign any contract.

6.3.2 Lead Specialists or a Director may sign contracts in respect of procurement within their service area.

6.3.3 Lead Specialists or a Director may delegate their Authority to sign to an Officer, however this must be in accordance with the requirement in the Finance Procedure Rules.

6.3.4 As well as signing, contracts may also require sealing under Contract Procedure Rules. Procuring Officer must agree and liaise with the Monitoring Officer where a seal is required.

6.4 Further Authorisation for Advance Payments

6.4.1 Contracts requiring payment in advance must be authorised in accordance with the Financial Procedure Rules. In particular:

- a) Payments in advance in excess of £5,000 must be authorised by a Finance Specialist; and,

- b) Payments in advance in excess of £50,000 must be authorised by the Section 151 Officer.

6.5 Deeds, Sealing and Signing of Contracts

6.5.1 A Contract must be sealed with the common seal of SSDC where:

- a) SSDC may wish to enforce the contract more than 6 years after its end (e.g. construction works); or,
- b) The price paid or received under the contract is a nominal price and does not reflect the value of the goods, services or works; or,
- c) The risk presented by the contract requires it, as agreed by the Monitoring Officer and the Procurement Specialist.

6.5.2 Before a contract can be sealed by SSDC, the Procuring Officer must provide the relevant Authority to award in writing from the appropriate decision maker.

7. Contract Management – the Manage phase

7.1 Contracts Register

7.1.1 All contracts having a value or estimated value of £5,000 (five thousand pounds) or more must be entered in SSDC's Contracts Register, which will be monitored by the Procurement Specialist and published under Transparency Regulations requirements.

7.1.2 The Procuring Officer will ensure that signed copies of the contract are stored in and copied to the Procurement Specialist.

7.1.3 The Procuring Officer must keep and maintain records in respect of each Tender and Contract (such records should include the materials relating to all of the stages of the procurement cycle).

7.1.4 The Procurement Specialist will carry out quarterly spot checks to check compliance with these rules.

7.2 Contract Documents and Letters of Intent

7.2.1 Wherever practicable, work under a contract must not start until the contract documents and all other procedures have been completed to the satisfaction of a Lead Specialist (who is not responsible for the contract) or, in the case of a procurement presenting a significant risk in accordance with the Contract Management Framework, a Lead Specialist (who is not responsible for the contract) and the Procurement Specialist. A letter of intent must not be issued unless approved by the Monitoring Officer.

7.3. Variations and Extensions

7.3.1 Variations must not exceed the scope, financial value or duration of the advertised contract.

7.3.2 Where the relevant Officer considers that a proposed variation may materially change or exceed the specification, price or duration of a contract, advice must be obtained from the Procurement Specialist.

7.3.3 Variations to contracts must be approved and signed by the relevant officers in accordance with Financial Procedure Rules.

7.3.4 Extensions of contracts may only be made where:

- a) There is an existing budgetary provision; or,
- b) There is a budgetary provision agreed by the S151 Officer, and
- c) Value for Money can be clearly demonstrated, and that the extension will not contravene any legal requirement.

7.3.5 For Contracts below the PCR2015 Threshold:

- a) There is a provision stipulated in the original contract for an extension; or,
- b) The extension does not exceed 50% of the original contract value; and
- c) The extension does not cause the Total Contract Value to exceed the relevant PCR2015 Threshold.

7.3.6 For contracts at or over the PCR2015 Threshold, the original Contract Notice advertised, and the contract permits the extension.

7.3.7 Where the Officer responsible considers that a proposed extension may materially change or exceed the specification, price or duration of a contract, Authority for the extension must be obtained from the Lead Specialist or a Director for the service area to which the procurement relates and the Procurement Specialist.

7.3.8 Extensions to contracts must be approved and signed by the relevant officers in accordance with the approval levels set out in Financial Procedure Rules.

7.3.9 For contracts with a Total Contract Value exceeding the PCR2015 Threshold, any variation or extension to a Contract which in aggregate results in additional costs exceeding 10% of the original contract value will be subject to the prior approval of the Lead Specialist or the Director for the service area to which the procurement relates and the Monitoring Officer.

7.3.10 For contracts with a Total Contract Value exceeding the PCR2015 Threshold, any variation or extension to a contract which in aggregate results in:

- a) additional costs exceeding 10% of the original contract value;
- b) A significant delay in the time for completion; or,
- c) Significant risks not initially identified,

will be reported at the earliest opportunity to the Section 151 Officer and will be subject to their approval in conjunction with an appropriately empowered Officer.

7.3.11 The Officer responsible for the amendment to the contract must ensure that all variations and/or extensions, are stored with the original signed and dated contract.

7.4. Contract Management and Contract Expiry

7.4.1 For all new Gold contracts (as defined in the Contract Management Framework), a contract manager must be appointed and named in the Procurement Documents and contract.

7.4.2 All contracts with a Total Contract Value over the relevant PCR2015 Threshold or where supplier failure would have an adverse impact on SSDC's service delivery must have in place:

- a) A contract management plan;
- b) A risk register, and risk mitigation strategy;
- c) A contingency plan;
- d) An exit management plan, together with appropriate contract clauses, to minimise the potential impact on SSDC's service delivery, as a result of the expiry, or early termination, of the contract.

8. Further Advice

8.1 Miscellaneous procurement issues

Should the procurement or management of a contract involve the following, or should the Procuring Officer have any queries regarding the following, the Officer should seek the advice of the Procurement Specialist or the Monitoring Officer as appropriate:

- a) Confidentiality of sensitive commercial information;
- b) The organisation of Presentations, Demonstrations, Site visits and interviews;

- c) Abnormally low bids;
- d) Contracts exceeding the written estimate;
- e) Clarification of tenders from candidates;
- f) Post tender negotiation and best and final offers;
- g) Electronic auctions;
- h) Early termination of a contract;
- i) Assignment or novation of a contract;
- j) State aid;
- k) Development agreements.

8.2 Amendments to These Contract Procedure Rules

The Monitoring Officer will be empowered to review in consultation with the Procurement Specialist the Contract Procedure Rules from time to time and as often as may be necessary in consultation with the S151 Officer and Lead Councillor and, following formal approval by Full Council, will publish details of any amendments.

For minor amendments the Monitoring Officer in consultation with the Portfolio Holder has delegated authority to makes changes to the Contract Procedure Rules and report on these at the next Council meeting for transparency. (Minor amendments would include for example changes to Officer roles in procedures).

Appendix 1 Procurement Procedure Framework

Table 1A Goods and Services

This table provides a summary framework for SSDC contract procedures required per life time contract value for **Goods and Services**

Contract Value		Process	Award Procedure	Contract Opportunity Publication	Documentation	Contract award notice	Application of exemptions/waivers
From	To						
£0	£5,000	Quotation	Demonstrate Value for Money	Low Value Purchase Not applicable	Quotation may be delivered by e-mail. Purchasing Officer to maintain records demonstrating Value for Money.	Not required	Not applicable
£5,000	£25,000	RFQ (Request for quotation)	Minimum of three written quotations based on a Request for Quotation (RFQ) document with Standard T&Cs	Discretionary requirement 1. RFQ from selected suppliers via email or 2. Selected Suppliers via Supplying the Southwest portal or 3. All Suppliers via Supplying the Southwest portal and Contracts Finder (See Note 1)	Must be based on a written specification provided to the supplier by SSDC. Quotation should be returned by email, post or via the e-tendering system. Lead Officer to maintain records demonstrating Value for money.	Mandatory requirement Publish on SSDC Contracts Register (See Note 3)	Waiver Request Form required
£ 25,000	PCR2015 Threshold	Formal tender	RFQ or tender process with appropriate T&Cs	Mandatory requirement 1. Supplying the southwest portal	ITT documentation as relevant. Bids must be returned via e-tendering system.	Mandatory requirement 1. Publish on Contracts Finder	

Contract Value		Process	Award Procedure	Contract Opportunity Publication	Documentation	Contract award notice	Application of exemptions/waivers
				2. Contracts Finder	Lead Officer to maintain records demonstrating vfm.	if openly advertised 2. Publish on SSDC Contracts Register	Waiver Request Form required
Over PCR2015 Threshold		Formal tender	Full tender process with appropriate T&Cs	Mandatory requirement 1. Supplying the southwest 2. Find a Tender 3. Contracts Finder	ITT documentation as relevant. Bids must be returned via e-tendering system.	Mandatory requirement 1. Find a Tender award notice 2. Publish on Contracts Finder 3. Council Contract Register	Waiver Request Form required

Note 1 The obligation to advertise prospective contracts on Contracts Finder is set out in Regulation 110 of the Public Contracts Regulations 2015.

This obligation applies only, “where a contracting authority advertises a contract award opportunity”.

It does not apply where there is no “public advertisement” of the contract opportunity, such as where a contracting authority approaches a single contractor (for example, the incumbent to extend an existing contract for a short period to cover a delayed procurement), or a “closed list” of contractors invited to tender by the contracting authority.

This is made clear in Regulation 110(5)(b) which states clearly that a contracting authority

“does not advertise an opportunity where it makes the opportunity available only to a number of particular contractors selected for that purpose”.

There are only two circumstances in which a contracting authority is required to advertise a contract valued below the PCR2015 tendering threshold publicly:

- where the contract may be of “cross border” interest to contractors based in other EU member states (which is often relevant for supplies contracts or for contracting authorities based in Northern Ireland, but not usually for contracting authorities seeking contractors or service providers within mainland Britain); or
- where the project is being funded by grant (particularly European Structural Investment Funding such as ERDF or ESF) and the grant conditions require public advertising.

Outside of these two circumstances, there is nothing in the Regulations that requires contracting authorities to advertise “below PCR2015 Threshold” tender opportunities publicly.

Note 2 It is compulsory to post award notice on contracts finder for contract value >£25k (does not apply for call-offs under a framework agreement)

Note 3 Local authorities must also publish details of any contract, commissioned activity, purchase order, framework agreement and any other legally enforceable agreement with a value that exceeds £5,000. (Contract Register)

For each contract, the following details must be published: reference number title of agreement local authority department responsible description of the goods and/or services being provided supplier name and details sum to be paid over the length of the contract or the estimated annual spending or budget for the contract Value Added Tax that cannot be recovered start, end and review dates whether or not the contract was the result of an invitation to quote or a published invitation to tender, and whether or not the supplier is a small or medium sized enterprise and/or a voluntary or community sector organisation and where it is, provide the relevant registration number.

Table 1B Works

This table provides a summary framework for SSDC contract procedures required per life time contract value for **Works**

Contract Value		Process	Award Procedure	Contract Opportunity Publication	Documentation	Contract award notice	Application of exemptions/waivers
From	To						
£0	£10,000	Quotation	Demonstrate Value for Money	Low Value Purchase Not applicable	Quotation may be delivered by e-mail. Purchasing Officer to maintain records demonstrating Value for Money for money.	Not required	Not applicable
£10,000	£25,000	Quotation	Demonstrate Value for Money	Discretionary requirement 1. RFQ from selected suppliers via email or 2. Supplying the Southwest portal 3. Contracts Finder	Quotation may be delivered by e-mail. Purchasing Office to record details demonstrating Value for Money for money.	Mandatory requirement 1. SSDC Contracts Register (>£5k)	Not applicable
£ 25,000	PCR2015 Threshold	RFQ or Formal tender as appropriate	RFQ or Full tender process with appropriate T&Cs	Mandatory requirement 1. Supplyingthesouthwest 2. Contracts Finder	ITT documentation as relevant. Bids must be returned via e-tendering system.	Mandatory requirement 1. Publish on Contracts Finder if openly advertised 2. Publish on SSDC Contracts Register	Waiver Request Form required

Contract Value		Process	Award Procedure	Contract Opportunity Publication	Documentation	Contract award notice	Application of exemptions/waivers
Over PCR2015 Threshold		Formal tender	Full tender process with appropriate T&Cs	Mandatory requirement <ol style="list-style-type: none"> 1. Supplying the southwest 2. Contracts Finder 3. Find a Tender 	ITT documentation as relevant. Bids must be returned via e-tendering system.	<ol style="list-style-type: none"> 1. Find a Tender award notice 2. Publish on Contracts Finder 3. SSDC Contracts Register 	Waiver Request Form required

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Appendix 2 Waiver Request Form content

The following information will be required as a minimum:

1. Details of goods, services or works
2. Total value of waiver request and period of appointment
3. What is the background to the waiver request?
4. What are the circumstances [paragraph 1.4.3](#) of the Contract Procedure Rules that apply?
5. How does the waiver deliver Value for Money?
6. What are the risks associated with this waiver?
7. What action can be taken to remove the need for a waiver in the future?

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Appendix 3 Monitoring compliance with Contract Procedure Rules

Sampling and monitoring process for compliance with Contract Procedure Rules

The following sampling approach is to be implemented from end of Quarter 3 2021/22. The Procurement Specialist will complete this on a quarterly basis (10 days after quarter end):

Contract band description	Goods and Services estimated value limit	Works estimated value limit	Sampling approach
Very low value	£0 - £5,000	£0 - £10,000	Sample 2 transactions from Contract Register data for good and services for compliance with PO procedure and vfm evidence <£10k, Procurement Specialist will sample 2 transactions from Contracts Register for Works
Low value	£5,001 - £25,000	£10,001 - £25,000	Procurement Specialist will sample 2 goods & services and 2 works transactions for compliance with quotation procedure
Medium value	£25,001 – PCR2015 threshold (£189,330)	£25,001 – PCR2015 threshold (£4,733,252)	Procurement Specialist will sample 2 goods & services and 2 works transactions for compliance with Procontract procedure
High value	>PCR2015 threshold (£189,330)	>PCR2015 threshold (£4,733,252)	Any transaction >PCR2015 threshold will be tested for compliance

Reviewing and agreeing appropriate action on breaches to Contract Procedure Rules

- Below threshold 1 (£5k or £10k) – Procurement Specialist, Lead Specialist and Officer concerned to review
- Below threshold 2 (£25K) – Procurement Specialist, Lead Specialist and Officer concerned to review
- Below threshold 3 (PCR2015) – Procurement Specialist, Director/Lead Specialist and Officer concerned to review
- Above threshold 3 (PCR2015) – Procurement Specialist, Director/Monitoring Officer

Reporting

- The Procurement Specialist will report to Monitoring Officer on all breaches quarterly.
- This report will also include a list of all waivers agreed in the same quarter.

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Appendix 4 Glossary of Terms

Term	Description
Contracts Finder	Contract Finder is the portal that allows suppliers to search for Public Sector contract opportunities by setting up email updates for different categories of procurement. When SSDC issues a contract notice on Contracts finder all relevant suppliers will be notified of the opportunity.
Collateral Warranty	A Collateral Warranty is a supporting document to a primary contract where an agreement needs to be put in place with a third party outside of the primary contract. It can provide the third-party contractual rights enabling it to claim for losses which would not otherwise be recoverable. On a construction or engineering project, a collateral warranty is a contract under which a professional consultant (e.g. architect), contractor or sub-contractor warrants to a third party that it has complied with its appointment.
MEAT	Most Economically Advantageous Tender is a method of assessment used for evaluating and awarding a contract. It allows SSDC to award the contract on quality criteria other than just Price.
MAT	Most Advantageous Tender is the proposal within the Government's Green Paper: Transforming public procurement to change the basis of contract awards from Most Economically Advantageous Tender (MEAT) to Most Advantageous Tender (MAT). The objective of this proposed change is to remove the perceived restrictions that prevent Authority's having regard to broader non-financial considerations.
Parent Company Guarantee	A Parent Company Guarantee is a guarantee given by one contracting party's ultimate or intermediate holding company in favour of the other contracting party (SSDC) to secure the performance of that party's obligations under a contract.
Performance Bond	A Performance Bond is common in construction and is a financial instrument issued by a bank or insurance company to ensure the successful completion of a large project. It protects SSDC against a contractor failing to deliver the work e.g. through bankruptcy.
ProContract	SSDC's Electronic Tendering System
Selection and Award Criteria	Selection criteria are the minimum requirements or standards that bidders must meet to progress in a procurement. For bidders having met the selection criteria, award criteria are used to determine which bidder is best placed to be awarded the contract.
Selection Questionnaire	A Selection Questionnaire enables suppliers to make a self-declaration on grounds for exclusion from a procurement process – the standard form is set out in Procurement Policy Note 8/16.
Value for Money	Value for Money is the most advantageous combination of cost, quality and social value to meet SSDC requirements. Please see MEAT and MAT.



South Somerset District Council

Social Value Policy

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Table 1: Version History

VERSION	CHANGE	DATE
1.1	DRAFT – MIRIAM KIRCHBERGER	8/03/2021
1.2	REVISIONS – MICHAEL O’HALLORAN AND BRENDAN DOWNES	24/05/2021
1.3	REVISIONS – MIRIAM KIRCHBERGER	08/09/2021

May 2021

Social Value Policy

1. Introduction

Social Value for South Somerset is about more than driving a hard bargain when procuring services – it is an active working out of our council vision, aims and themes as expressed in our Council Plan.

Purpose and background

- 1.1. In light of Covid-19, the role of Councils as economic actors will be crucial in restarting local economies. SSDC is committed to including Social Value into the way procurement decisions are made to ensure the Council meets the goals set out in our Council Plan, Environment Strategy, Economic Development Strategy and Recovery Strategy.
- 1.2. South Somerset District Council is required to consider, before commencing any procurement process, how the economic, social and environmental wellbeing of the district may be improved through the procurement of its services as part of the Public Service (Social Value) Act 2012. The aim of the Act is not to alter the commissioning and procurement processes, but to ensure that, as part of these processes, the Council gives consideration to the wider impact of service delivery.
- 1.3. This policy establishes a consistent and collaborative approach to Social Value with the vision to create, deliver and sustain greater community benefits through the use of Social Value in our authority and district.
- 1.4. The purpose of this policy is to formally embed the consideration Social Value into all procurement conducted by the Council, in line with the priorities in the Council Plan. This is also reflected in the Council's Procurement Strategy and supported by the Contract Standing Orders.
- 1.5. In 2019, SSDC engaged the Social Value Portal to work collectively to embed and develop the Social Value and the TOMs framework into our procurement activity.

2. Defining Social Value

- 2.1. As the Public Service (Social Value) Act 2012 Act does not define what is meant by "Social Value" the Council will adopt the definition of Social Value as set out by the Social Value Portal¹. Social Value is described as follows:

"Social Value serves as an umbrella term for these broader effects, and organisations which make a conscious effort to ensure that these effects are positive can be seen as adding Social Value by contributing to the long-term wellbeing and resilience of individuals, communities and society in general."
- 2.2. This Social Value policy seeks to promote the following aims through South Somerset's procurement activity:

¹ The Social Value Portal is an organisation established to promote better business and community wellbeing through the integration of Social Value into day to day business and the uptake of The Social Value Act.

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- 2.2.1. Support the future prosperity of South Somerset, its businesses and all its citizens
- 2.2.2. Enhance social opportunity and cohesion in a dynamic and changing business environment
- 2.2.3. Help to develop improvements for disadvantaged neighbourhoods and people
- 2.2.4. Create and maintain a sustainable, clean, safe and attractive environment for living, work and leisure

3. Social Value Outcomes

- 3.1. The Council Plan 2020-2024, the Environment Strategy, the Economic Development Strategy and Recovery Strategy set out the Aims, Values, Themes and Focus for the Council. Delivery of this policy will support all five Themes of the Council Plan and in particular the ambition to “Embed Social Value into all processes and activities to ensure we maximise the support we give to our communities”.
- 3.2. Delivery of the Council priorities through use of our procurement power which ensures maximum benefit for our local communities when letting contracts.
- 3.3. Defining Themes Outcomes and Measures (TOMs) to reflect both organisational and wider societal priorities creates the “golden thread” from strategy to delivery. This is needed to set a framework in which stakeholders, business and community partners can engage to support the Council’s Social Value objectives and deliver measurable change.
- 3.4. The Council procures a wide range of goods and services, and it is recognised that there can be a no “one size fits all” model. The policy will need to be applied in a proportionate manner and be tailored to reflect the works, service or goods to be procured. It is the role of commissioners and procuring officers to consider, on a contract by contract basis, the potential Social Value outcomes that could be delivered through the procurement process and the most appropriate procurement strategy to achieve this.
- 3.5. Where appropriate in its procurement activities, the Council will specify Social Value outcomes that are proportionate and relevant to the specification of the service required and will evaluate tenders in accordance with those Social Value outcomes and specification.

4. How we apply and measure Social Value

- 4.1. The Council has identified the commodity areas where there is greater scope for local supply market engagement or to drive environmental opportunity in the Commodity and Supplier Risk matrix. This provides a broad framework of where specific Social Value opportunities may have the greatest return. However, Social Value is considered on all significant contracts on their individual merit.
- 4.2. The Council is committed to a performance and evidence-based approach to Social Value and uses the National TOMs framework which provides quantitative measures of Social Value. Therefore bidders are required to

Social Value Policy

propose credible and tangible targets against which contracts are awarded and the performance (for the successful bidder) will be monitored.

- 4.3. SSDC has developed a TOMs shortlist which reflects the Council's priorities. By adapting the National TOMs, the Council is able to measure, manage and maximise the delivery of Social Value internally without having to consult third parties for evaluation or reporting of contractualised Social Value. By using the National TOMs in its framework, the Council is using a broadly understood framework which ensures a fairer and consistent process for all bidders.
- 4.4. The Social Value policy asks contractors to consider where and how their activities can have a social impact. Examples of Social Value outcomes that could be achieved are shown in Appendix 1. **The examples listed are not exhaustive and could be expanded where relevant.**
- 4.5. SSDC has set a minimum weighting for Social Value as 10% of the overall price and quality evaluation criteria when evaluating tenders. This will apply for the financial year 2021/22 and is subject to review on an annual basis.

4.6. **Table 2** below sets out further detail around processes by value:

Value	Contract Duration	Process	Potential Outcomes	Evaluation and Monitoring
Sub-OJEU	<6 months	Light touch Social Value will be included, using SSDC own system to measure Social Value	Expectations may not be specific to a project but take into account what the organisation does as a whole. The weighting as identified in section 4.5..	Social Value proposals and subsequent delivery will be evaluated and monitored internally by SSDC, using the SSDC TOMs framework.
Sub-OJEU	>6 months	Managers will be required to ensure that Themes, Outcomes and Measures (TOMs) are included within the procurement process. It is an expectation that Social Value will apply to procurement requirements that fall within this threshold and any exceptions to this rule must be authorised by the Procurement Specialist	Businesses may be expected to respond to the range of opportunities contained within the TOMs matrix. They will be assessed on their project specific proposals The weighting as identified in section 4.5..	Social Value proposals and subsequent delivery will be evaluated and monitored internally by SSDC, using the SSDC TOMs framework.

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OJEU or over	Generally >6 months but assessed on a case by case basis.	Procuring officers will guide specifications and tender documents to ensure that considerations for Social Value is made at the procurement/commissioning stage and that TOMs are included within the tender process, ensuring that the evaluation scores and weightings are clearly set out and that an action plan is implemented during the contract period.	Businesses will be expected to respond fully to the TOMs matrix and commit to project specific deliverables that will be included in KPIs. The weighting as identified in section 4.5. Weightings above the minimum threshold are used where contract price is set, or there is a specific opportunity around Social Value to solve a specific need.	Social Value proposals and subsequent delivery may be evaluated and monitored internally by the Social Value Portal where feasible.
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5. Scope

- 5.1. The Council adopts the parameters set out in table 2 which is applied flexibly to ensure that Social Value sought from a contract is relevant and proportionate in respect of the proposed contract.

6. Consultation

- 6.1. In discharging its statutory duties, procuring officers are required to consider whether consultation should take place when commissioning, so as to allow the community and voluntary sectors to be more closely involved in order to support in improving the South Somerset's economic, social and environmental well-being.

7. Responsibility

- 7.1. The Social Value Policy is owned and developed by the Procurement team who report to the Director for Strategy and Support Services. All procurement decisions are authorised in line with the Council's constitution and are managed through the procurement processes, as set out in the Council's Contract Standing Orders.

8. Monitoring and Review

- 8.1. Social Value delivery will be reported by the Procurement team and may also be reported in specific reports on delivery against the Council Plan and where appropriate through the Portfolio Holders responsible for individual projects.
- 8.2. The Council will periodically review its Social Value Policy in consultation with key stakeholders. In doing so it will take into account any changes in legislation pertaining to the Social Value Act 2012, Public Contracts Regulations and the Council Plan.

Appendix 1: SSDC TOMs Shortlist

Council Theme	Potential outcomes	Potential measures
<p style="text-align: center;">Assist businesses to recover from the Covid-19 pandemic whilst supporting growth within the South Somerset economy</p>	<p style="text-align: center;">More local people in employment</p>	<p>No. of local direct employees (FTE) which are TUPE transfers retained on contract for one year or the whole duration of the contract, whichever is shorter (re-tendered contracts only - to be used at Measurement)</p>
		<p>No. of local direct employees (FTE) hired or retained (for re-tendered contracts) on contract for one year or the whole duration of the contract, whichever is shorter</p>
		<p>Percentage of local employees (FTE) on contract</p>
	<p style="text-align: center;">More opportunities for disadvantaged people</p>	<p>No. of employees (FTE) hired on the contract who are long term unemployed (unemployed for a year or longer) as a result of a recruitment programme</p>
		<p>No. of armed forces veterans employees (FTE) hired on the contract as a result of a recruitment programme who are long term unemployed (unemployed for a year or longer) and are facing specific barriers to transitioning to civilian employment that do not qualify them as disabled (e.g. long term service)</p>
		<p>No. of homeless employees (FTE) hired on the contract as a result of a recruitment programme</p>
		<p>No. of parents returning to work (FTE) hired on the contract as a result of a recruitment programme who are long-term unemployed (unemployed for a year or longer) - (when the mother is the primary carer)</p>
		<p>No. of survivors of modern slavery employees (FTE) hired on the contract as a result of a recruitment programme</p>
		<p>No. of employees (FTE) hired on the contract who are Not in Employment, Education, or Training (NEETs) as a result of a recruitment programme</p>
		<p>No. of 16-25 y.o. care leavers (FTE) hired on the contract as a result of a recruitment programme</p>

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	No. of 18+ y.o. employees (FTE) hired on the contract who are rehabilitating or ex offenders as a result of a recruitment programme
	No. of 18-24 y.o. employees (FTE) hired on the contract who are rehabilitating young offenders as a result of a recruitment programme
	No. of disabled employees (FTE) hired on the contract as a result of a recruitment programme
	No. of armed forces veterans employees (FTE) hired on the contract as a result of a recruitment programme who are disabled and are facing specific barriers to transitioning to civilian employment (e.g. physical injury, medical discharge, psychological condition)
	No. of hours of support into work provided to unemployed people through career mentoring, including mock interviews, CV advice, and careers guidance -(over 24 y.o.)
Improved skills	No. of staff hours spent on local school and college visits e.g. delivering careers talks, curriculum support, literacy support, safety talks (including preparation time)
	No. site visits for school children or local residents
Improved skills for disadvantaged people	No. of weeks of training opportunities on the contract (BTEC, City & Guilds, NVQ, HNC) that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+
	No. of weeks of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+
Improved skills for a low carbon transition	Support a 'just transition' for workers by supporting those in 'traditional' high carbon industries to retrain
	No. weeks on the contract of apprenticeships relating to the low carbon economy - opportunities either to be completed during the year, or that will be supported by the organisation to completion in the following years - Level 2,3, or 4+
Improved employability of young people	No. of hours dedicated to support young people into work (e.g. CV advice, mock interviews, careers guidance) - (under 24 y.o.)
	Employer's fairs held to encourage local employment in the area
	No. of weeks spent on meaningful work placements or pre-employment course; 1-6 weeks student placements (unpaid) –

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Council Theme	Potential outcomes	Potential measures
Keep South Somerset clean, green and attractive and respond to the climate and ecological emergency	Carbon emissions are reduced	Savings in CO2 emissions (or carbon emission equivalent) on contract achieved through de-carbonisation (specify how these are to be achieved)
		Policy and programme to achieve net zero carbon by 2030 including monitoring plan with specific milestones (issued or to be issued by the end of 2020)
		Carbon savings from energy efficiency measures on site (e.g. increased use of renewables)
		Offset embodied carbon emissions from construction material
		Embodied Carbon reductions in CO2e emissions against baseline
		Carbon Certification (Carbon Trust Standard, Planet Mark or equivalent independently verified) - achieved or to achieve for current year
		Carbon reductions through energy efficiency measures or renewables - building operations - (e.g. REEB benchmark or 3 year baseline)
		Percentage of buildings meeting target (Building use less energy and are more energy efficient)
	Air pollution is reduced	Car miles saved on the project as a result of a green transport programme or equivalent (e.g. cycle to work programmes, public transport or car pooling programmes, etc.)
		Car miles driven using low or no emission staff vehicles included on project as a result of a green transport programme
		Corporate travel schemes available to employees on the contract (subsidised public transport, subsidised cycling schemes and storage, sustainable corporate transport such as electric bus from public station to corporate facilities)
		Percentage of fleet or construction vehicles on the contract that is at Least Euro 6 or LEV
	Safeguarding the natural environment	Offsets or mitigation initiatives on biodiversity delivered whenever restoration is not available, and when implemented beyond legislative or regulatory requirements: Natural Capital Approach carbon sequestration and air quality benefits

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	Resource efficiency and circular economy solutions are promoted	Plastic recycling rate on the contract (to e.g. reduce microplastics)
		Support provided internally and to MSMEs and VCSEs within the supply chain to adopt Circular Economy solutions - business case and leadership for circular economy
		Single-use plastic packaging eliminated through reusable packaging solutions or schemes (e.g. Loop or equivalent) on the contract
		Value of local partnerships to implement circular economy solutions
		Waste management verification policies: audit hierarchy, downstream audits for waste stream
		WATER: Percentage of buildings meeting good practice benchmark (e.g. REEB)
		M3 water saved against relevant benchmark (e.g. REEB)
		WASTE: Percentage of buildings meeting good practice benchmark (e.g. REEB)
		Percent of waste diverted against relevant benchmark (e.g. BREEAM)
	Tonnes of waste diverted against relevant benchmark (e.g. BREEAM)	
	Sustainable Procurement is promoted	Percentage of procurement contracts that includes sustainable procurement commitments or other relevant requirements and certifications (e.g. to use local produce, reduce food waste, and keep resources in circulation longer.)
		Percentage of contracts with the supply chain requiring contractors to operate low or zero emission vehicles
		Supply Chain Carbon Certification (Carbon Trust Standard for Supply Chain or equivalent independently verified) - achieved or to achieve for current year
		Requirements or support (for Micro or Small enterprises) for suppliers to demonstrate climate change and carbon reduction training for all staff - e.g. SDGs Academy courses (NTs) or (e.g. RE) Supply Chain Sustainability School bronze or higher or equivalent
	More buildings are certified	Percentage of NEW buildings achieving BREEAM Rating
Percentage of assets that have undergone a climate risk assessment		
Percentage of assets where sustainability risk has been reduced		
Percentage of buildings achieving BREEAM IN-USE		

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Council Theme	Potential outcomes	Potential measures
Enable healthy communities which are cohesive, sustainable and enjoy a high quality of life	Crime is reduced	Initiatives aimed at reducing crime (e.g. support for local youth groups, lighting for public spaces, private security, etc.)
	Creating a healthier community	Initiatives to be taken to tackle homelessness (supporting temporary housing schemes, etc.)
		Initiatives to support rough sleepers - including training for security and night staff, opening up facilities spaces (e.g. showers or additional beds when temperature drops) after hours
		Initiatives taken or supported to engage people in health interventions (e.g. stop smoking, obesity, alcoholism, drugs, etc.) or wellbeing initiatives in the community, including physical activities for adults and children
	Vulnerable people are helped to live independently	Initiatives to be taken to support older, disabled and vulnerable people to build stronger community networks (e.g. befriending schemes, digital inclusion clubs)
	More working with the Community	Donations or in-kind contributions to local community projects (£ & materials)
		No. of hours volunteering time provided to support local community projects



South Somerset District Council

Contract Management Framework

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Table 1 - Revision History

VERSION	CHANGE	DATE
1.00	BRENDAN DOWNES, CHANELLE BUSBY (EXETER CITY COUNCIL), TRACEY FIELD (TORBAY COUNCIL) – DRAFT TEMPLATE	APRIL 2019
1.01	BRENDAN DOWNES – REVIEW AGAINST SELF-SERVICE MODEL AND RISK CLASSIFICATION	JANUARY 2020
1.20	BRENDAN DOWNES, MIRIAM KIRCHBERGER AND MICHAEL O'HALLORAN – ADAPTATION TO SSDC OPERATING MODEL	APRIL 2021

PURPOSE OF THIS DOCUMENT

This document outlines the approach to contract management activities across the organisation and provides all stakeholders with an agreed approach.

A significant level of the organization's budget is spent on external third-party service providers.

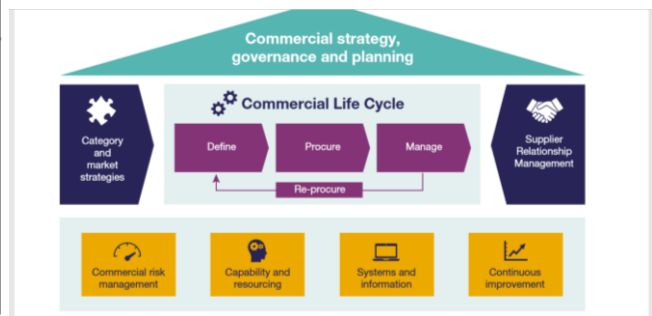
The reliance and dependency on external market solutions has increased and therefore, the performance of these supply markets is vital to council in achieving its strategic aims both in terms of service quality and managing and balanced budget.

Public Sector contracts are increasing in commercial complexity and size typically this increased contract duration and sourcing difficulties. Managing commercial relationships is a vital competence to ensure that quality, service and cost outcomes are met or exceeded.

The following framework draws upon existing good practice, national guidance and National Audit Office (NAO) recommendations.

DEFINITION

Contract Management is part of the 'Review' stage of the commissioning cycle or the 'Manage Phase' within Cabinet Office guidance.



For the purpose of this document the definition used is a management process that

- ensures the contract yields the projected outcomes
- benefits any market advantage secured during the tendering phase of the procurement process is realised
- further improvements are made through proactive performance management during the term of the contract.

This framework recognises that contract management is a holistic process that combines a mix of strategic and operational tasks depending on the type of contract and the goods or services being supplied.

Good contract management ensures that;

- The contract owner is accountable for ensuring that contract outcomes are met or exceeded;
- Contract, supplier or supply chain risk is monitored and where possible reduced or managed;

- Contracting organisations are often able to increase the level of efficiency savings arising from post contract management as well as delivering other non-commercial benefits such as better quality and service outcomes for service users, lower risk and additional social value during the life of the contract;
- Contract management resources are appropriately allocated to those commercial relationships that present the highest strategic importance or risk.

SITUATION

1. SSDC has a decentralised procurement model based on self-service supported by a small centralised procurement team who set strategy for procurement and contract management supported by the development of appropriate processes, methods and tools.
2. The rules of procedure for the procurement lifecycle are defined in Contract Standing Orders.
3. Purchasing volumes of the organisation are shown in link to annual spend report to be inserted later.
4. SSDC classifies contracts as Gold/Silver/Bronze, based on a category and supplier risk assessment which models spend categories against service criticality, and market and supplier risk.
5. The SSDC contract management arrangements for the categories of contract is broadly aligned to guidance from Cabinet Office. The detail is described below.

TARGET

1. To create a consistent, risk based approach to Contract Management across the organisation that can be applied to all external third-party relationships.
2. To raise awareness of contract management activity and its contribution to the organisations future agenda by;
 - a. Developing a culture of continuous improvement internally and across the supplier base;
 - b. Enabling contract managers to understand how they can contribute to securing benefits such as sustainability or better local economic, social and environmental benefits (social value) and savings;
 - c. Ensuring that there is a strong linkage between commissioning strategies incorporating good procurement and contract management practices across the business.
3. To recognise the distinctive commercial skills and capabilities that good contract management requires and ensure these are embedded as business as usual and factored into new business activity.

4. To provide the necessary guidance and training on contract management processes.
5. To manage the Council's exposure to commercial, contractual and reputational risk through better contract management through the lifecycle of the contract and to embed this as part of business as usual activity.

PROPOSAL

6. Roles and responsibilities.
 - This framework and its deployment across the Organisation is owned and managed by the Procurement Function, with sponsorship and executive oversight by Director of Strategy & Support Services.
 - Responsibility for the successful application of this framework to contracts and the delivery of contract management tasks rests with each service area.
 - The Procurement Function will monitor performance and application of the framework and provide training and guidance to contract managers to consolidate and standardise contract management tasks.
 - This approach is consistent with the ultimate accountability for value for money and service delivery resting with the contract owner and service area.
 - Table 1 shows the Roles & Responsibilities at a high level.

Table 1 - Summary Roles & Responsibilities

<p>Contract Managers (subset of Specialist role, not a role in itself)</p>	<p>Management of contracts in accordance with the Contract Management Framework</p> <p>Contribution to the development of and use of corporate guidance and systems</p>	<p>Foundation level contract management training (Cabinet Officer)</p> <p>Internal SSDC training module on contract management</p> <p>Guidance on use of the CMP (Contract Management Plan)</p>
<p>Procurement Function</p>	<p>Development and implementation of the Contract Management Framework across the Council</p> <p>Advice to Contract Managers</p> <p>Development of tools, templates and systems (in</p>	

	<p>conjunction with contract management users)</p> <p>Raising the profile/awareness of good contract management practice</p> <p>assess the adequacy of contract management arrangements (in conjunction with Monitoring Officer and internal auditor)</p>	
SLT/Director of Strategy & Support Services	<ul style="list-style-type: none"> Executive oversight and accountability for the usage and effectiveness of the CMF across the Council 	

7. Contracts should be managed consistently and involve a standard range of tasks;

- The level/scope of these tasks should be commensurate with the value and risk associated with the contract
- Contract management risk based classification should be used to identify the level of risk associated with the contract based on the three areas of; service criticality, market size and difficulty of changing supplier

Question	Factors							Care Factors			Result
	Statutory / Discretionary	Customer Facing	Political Impact (Ext.)	Is this in the Service Plan/Business Plan?	Is this included on the Corporate Risk register?	Operational Impact	% of Population Affected	Is the contract for Placements which have a Safeguarding risk?	Number of Placements	Approving Body Reports (COC / Ofsted)	
How critical are these goods/services	Statutory	Yes	High	Yes	Yes	High	>25%	Yes	>4	Inadequate	Critical
	Discretionary	Yes	High	Yes	Yes	High	>25%	No	>4	Requires Improvement	Very important
	Discretionary	Yes	Medium	Yes	Yes	Medium	10%-24%	No	<3	Requires Improvement	Important
	Discretionary	No	Medium	No	No	Medium	10%-24%	No	<3	Good	Fairly important
	Discretionary	No	Low	No	No	Low	<9%	No	<3	Outstanding	Only slightly
Discretionary	No	Low	No	No	Low	<9%	No	<3	Outstanding	Not at all	

Question	Factors							Result
	Dependency on Supplier	TUPE Considerations	Termination Clause in Contract	Cost of Change	Dept. Resources to Manage Change	Process Required	Market Saturation	
How easy would it be to swap supplier	Complete	Yes	No	High	No	O/EU	High	Very complicated
	High	Yes	No	High	No	O/EU	High	Complicated
	High	Yes	No	High	No	Tender	Medium	Not straightforward
	Little	No	Yes	Medium	Yes	Tender	Medium	Moderately easy
	Little	No	Yes	Low	Yes	RFQ	Low	Easy
	None	No	Yes	None	Not needed	Seek Quotes	Low	Trivial

Question	Known Market size					Result
	>100	100-51	50-21	20-11	10-2	
What is the size of the supply market	X					Very large
		X				Large
			X			Medium
				X		Small
					X	Very small
						X

- For consistency, contracts should be assessed and managed in a standard way. For simplicity, three contract types are proposed; see Fig. – Contract Segmentation. Segmentation is risk based and uses total contract value and an assessment of service criticality, market size and difficulty in changing supplier.

- SSDC categorises its contracts into **Gold, Silver and Bronze** levels. Your Procurement Specialist will support in identifying the required approach if it isn't clear which category your contract fits into.
- A pragmatic approach to in classifying contracts in this way should be adopted.

Gold	Silver	Bronze
Usually Risk above 50%	Identified through management judgement based on specific circumstances of contract, project or supplier risk	Typically short-term/a PO)
Contract is critical to the SSDC in terms of strategic deliverables.	Less strategically important contracts but often critical to manage due to one or more of the elements of value, risk or complexity.	Commodity deliverable contracts which are less significant in terms of value and risk.
Entails an assigned Contract Manager working closely with stakeholders throughout the contract. Fullest set of management activities and governance applies, possibly including the allocation of an Executive Senior Responsible Owner.	Entails a reasonable degree of monitoring of contract deliverables by an identified Contract Manager. Assessments of contract and supplier performance may be undertaken.	End user led with minimal or no involvement from the Procurement unless required. Contract management activities will be limited to achieving on time, quality in full delivery with no impact on SSDC resource.

- The Council has approximately 13 commercial relationships (Gold suppliers) with an annualised value of more than £8,7m out of SSDC's £19.2m. These 13 suppliers equate to 2% of the current active suppliers but 45% of the total external spend (FY2020/21). These contract relationships would be classified as Gold according to their assessed service criticality.
- 12 contract relationships have been classified as Silver according to their assessed service criticality. The remaining commercial relationships that fall below the 50% risk threshold would be classified as Bronze according to their assessed service criticality.
- A draft high-level summary of tasks relating to each contract type is shown below.

Contract Management Tasks M=Mandatory D=Desirable E= By Exception	Contract Type		
	Bronze	Silver	Gold
Basic Contract Management Tasks			
Contract administration	M	M	M
Contract variation			
Contract compliance			
Dispute/issue resolution			
Contract operations (including); <ul style="list-style-type: none"> - Quality assurance - Service delivery - Budget monitoring, cost and financial administration - Monitoring and reporting as required to support or assure service delivery. 	M	M	M
Contract reviews	E	D	M
Performance Management			
Supplier performance review	E	D	M
Improvement initiatives	-	D	M
Supplier performance reporting	-	D	M
Stakeholder/user feedback/satisfaction feedback	-	D	M

Benchmarking	E	E	E
Risk Management			
Supplier risk monitoring and reporting	-	D	M
Business continuity plan	-	D	M
Relationship Management¹			
Dedicated Contract Manager	-	D	M
Relationship strategy & action plan	-	-	M
Joint working/improvement initiatives	-	D	D

8. Contracts should be managed by individuals who have appropriate skills and/ or training as set out in table 1.
9. Contract management resource needs to be sufficient to undertake the necessary tasks, and should be budgeted for in the business case and/; or procurement strategy.
10. The relevant contract manager should be involved as early as possible in the commissioning or procurement process and before Implementation Readiness, at latest business case stage.
11. Critical relationships, i.e. those suppliers of **Gold** contracts should have a stronger level of governance and executive oversight.

¹ Content will be informed by commissioning/procurement strategy



Medium Term Financial Plan (MTFP) Refresh 2021/22 – 2023/24

Executive Portfolio Holder: Peter Seib, Finance and Legal Services
SLT Officer: Karen Watling, Interim S151 Officer
Lead Officers: Karen Watling, Interim 151 Officer
Paul Matravers, Lead Specialist, Finance
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Purpose of the Report

1. In February 2021 Council approved the 2021/22 revenue and capital budgets including an indicative financial forecast for future years. This report updates that position taking account of last year's outturn figures, the budget monitoring information for the first quarter of this financial year (2021/22), and other updated information that has an impact on the financial position of the Council.
2. The report is structured as follows:
 - Context within which the MTFP will need to be prepared and agreed
 - 2020/21 Year End Financial Position
 - Current Year's (2021/22) Financial Position
 - MTFP Refresh - 2021/22 to 2023/24 – revenue expenditure, capital expenditure, Reserves, Borrowing Strategy, and Somerset Business Rates Pool
 - Next Steps Timeline

Forward Plan

3. This report appeared on the District Executive Forward Plan with an anticipated Committee date of July 2021.

Public Interest

4. Section 30(6) of the Local Government Finance Act 1992 requires the Council to set its budget **before 11 March in the financial year preceding the** one in respect of which the budget is set. This is the first of three reports that will achieve that outcome.

Recommendations

5. The District Executive recommend that the Chief Executive:
 - a) Note the contents of this report and in particular the issues that will need to be considered as part of budget setting process, the need to get approval from Council for revised estimates for this financial year, and the next steps timeline.

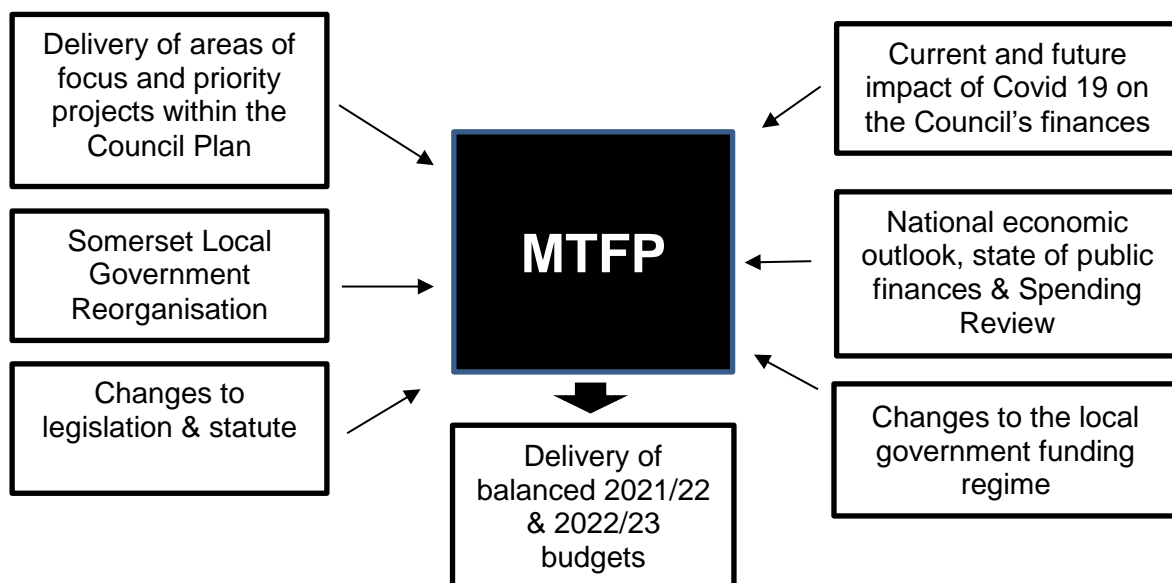


- b) Agree in principle SSDC’s continuing membership of the Somerset Business Rates Pool as discussed in paragraphs 74 and 75 of this report.

Context within which the MTFP will be prepared and agreed

- 6. The overall context within which the MTFP will be prepared and ultimately approved by Council in February 2022 is very challenging with a number of uncertainties that make robust financial planning difficult.
- 7. The diagram below shows the key issues that District Executive will need to consider when it recommends its final MTFP proposals to Council for approval in February 2022. A short description of each is set out in the paragraphs below.

Diagram 1: Key issues to be considered in agreeing the MTFP



Delivery of the Council Plan and Priority Projects

- 8. South Somerset District Council is an ambitious and forward-thinking council that is committed to transforming, improving, and adapting to be ready for the future. We place our residents and businesses firmly at the centre of everything we do.
- 9. The Council Plan sets out the vision for the Council and how these are going to be delivered through key areas of focus and priority projects. The current Council Plan covers the period 2020 to 2024 and can be found at:
<https://www.southsomerset.gov.uk/your-council/your-council-plan-and-strategies/council-plan/>

Our Vision

- 10. A naturally beautiful and sustainable environment, which also allows business to flourish and good homes to be delivered. A place where our communities are safe, vibrant and healthy and have access to exceptional cultural and leisure activities.

Our Values



Customers' first - Designing plans and services around our customers



Community at heart - Enabling residents to support our communities and the environment we live in



Open and transparent - Actively communicating, engaging and listening to feedback



Innovative - Embracing innovation & technology to improve customer service and facilitate access to council services for all who need it



Getting things done - Empowering dedicated and flexible employees and elected members focussed on delivery



Working collaboratively - Working with partners to enhance outcomes for our communities

Areas of Focus for 2021/22

- **Protecting Core Services** - to ensure a modern, efficient and effective council that delivers for its communities
- **Economy** - to make South Somerset a great place to do business, with clean inclusive growth and thriving urban and rural businesses
- **Environment** - to keep South Somerset clean, green and attractive and respond to the climate emergency
- **Places where we live** - to enable housing and communities to meet the existing and future needs of residents and employers
- **Healthy, self-reliant Communities** - to enable healthy communities which are cohesive, sustainable and enjoy a high quality of life

Priority Projects for 2021/22

Lead the recovery and revitalisation of our economy and communities to be stronger, more resilient and more vibrant than before Covid-19

Continue to deliver Regeneration Programmes

To develop proposals to accelerate the delivery of key housing sites and associated infrastructure

Address child poverty, social isolation and low levels of social mobility across the district

To accelerate action to adapt to and mitigate the effects of climate change and extreme weather

11. Given the Government’s decision to implement a single unitary council for Somerset (see below) in 2023/24, a “light touch” approach will be taken to update the Corporate Plan for the SSDC’s final year. The plan is therefore unlikely to change the areas of focus described above, rather changes will need to be made to the previously agreed priority projects and the annual action plan will be updated. Particular focus will be needed on the following:
- Ensuring key services continue to be delivered to our residents, regardless of the local government reorganisation.
 - Delivering key achievable elements, to be agreed with Members, of the Regeneration Programme by the end of 2022/23.
 - Progressing the Octagon Theatre Project to the Final Business Case stage—whilst understanding that, given the project timeline, the final decision to proceed will be decided by the new unitary authority.
 - Achieving the programme deadlines agreed by all Somerset councils for local government reorganisation.
 - Realistically reviewing all other priority areas and projects to establish if they are capable of being delivered by the end of 2022/23 and asking Members to agree to stop those that cannot be delivered.
12. It will be necessary to produce revised estimates for this financial year, and to include additional costs in the 2022/23 budget, to provide funding for the costs of reorganisation and for ensuring there is capacity to deliver ongoing services to residents whilst senior officers, by necessity, spend a significant proportion of their time on the reorganisation. Senior Leadership Team is currently assessing the costs that maybe involved and will present these to the District Executive at its meeting on 2nd December 2021.

Somerset Local Government Reorganisation

13. On the 21st July 2021, the then Secretary of State for Housing, Communities and Local Government, the Right Honourable Robert Jenrick MP, announced that he had decided to implement, subject to Parliamentary approval, the proposal for a single unitary council for the whole of the existing administrative county of Somerset.



14. The decision, announced in a ministerial statement to Parliament, would mean that a single unitary council for Somerset will be formed on 1st April 2023 to replace Somerset County Council, Mendip District Council, Sedgemoor District Council, Somerset West & Taunton Council, and South Somerset District Council.
15. Whilst all the councils concerned are currently discussing the implementation of the necessary changes, some details will not be clear until the Structural Change Order is laid before parliament later this year. The costs of implementation and the share of these costs from SSDC are currently being discussed.
16. **Our current assumptions on this issue are that:**

- a) *SSDC is a sovereign and autonomous organisation in terms of determining and approving its revenue and capital budgets for the financial year 2022/23, and for updating the budget for 2021/22, including its spending priorities, use of reserves, treasury management activities, and any increases to Council Tax.*
- b) *Notwithstanding the above, any significant new spending that has not been contractually committed before the Shadow Authority or Implementation Executive is in place in May 2022 maybe subject to review and a new approval process by that authority and that this will pragmatically be taken into account in considering any new capital or revenue proposals included in the MTFP.*
- c) *The MTFP will provide indicative estimates for the financial year 2023/24 (the first year of the new authority's existence) based on continuing existing district services. This will provide an input into the new authority's medium term financial planning process.*
- d) *No provision has currently been made in the MTFP Refresh for SSDC's potential share of the implementation costs as they are currently under discussion.*

Impact of Covid 19

17. The COVID-19 pandemic continues to have a profound impact on the council not only on budgets but on service demand and delivery, although the quantum of the financial impact in this year and next is still very uncertain. The pandemic has resulted in three major financial effects on the council's financial position: additional costs, loss of income, and agreed savings not being able to be delivered.
18. Up-to-now, the government has largely funded the additional costs incurred by local government as a result of the pandemic and provided considerable support to make up for income losses.

19. ***Our current assumptions on this issue are that:***

- e) *There is no further government support for the financial impacts of Covid 19 beyond what has been already announced, namely: Government's intention to part-compensate councils for lost income from sales, fees and charges incurred during the first quarter of this financial year (estimated at £42k), Covid-19 LA Support Grant (£838k), and Contain Outbreak Management Fund (£216k).*
- f) *The potential financial impacts of Covid 19 in this financial year can be met by the grant income described above and the agreed reduction approved in the 2021/22 fees and charges budgets (from pre-Covid levels) of £1.279m. However this assumption will be reviewed further as fees & charges income is currently forecast to underachieve by a further £1m in this financial year (as reported in the quarter 1 budget position).*
- g) *Pre-Covid levels of income from fees and charges, Business Rates and Council Tax are attained in 2022/23 onwards. However, again, this assumption will be reviewed given the current adverse forecast position on fees and charges income for this financial year.*
- h) *Savings targets of £196k assumed in this and next financial year arising from increases in fees and charges income and delayed transformation savings will not be met. This assumption will be revisited by the Senior Leadership Team as part of the preparation needed for the December Draft Budget Report to District Executive.*

National Economic outlook and the state of public finances

- 20. A deeper consideration of these issues will be included in the Draft Budget report presented to District Executive in December. This will allow Members to have the most up-to-date information as the latest economic reviews and forecasts, from such bodies as the Office for Budget Responsibility, Office for National Statistics, and HM Treasury were published several months ago and are due to be revised this autumn, too late for this report.
- 21. An understanding of the forecast economic outlook along with key indicators regarding employment, inflation, and interest rates is needed to provide robust estimates across the Council's revenue and capital budgets including its treasury management activities.
- 22. At the time of writing this report the key concerns for the S151 Officer are the increase in inflation currently being experienced and any impact this may have on interest rates. The Consumer Price Index (CPI) rose from 0.7% in January 2021 to 3.2% in August with many commentators (for example the Bank Of England on 23/09/21) warning that increasing energy costs will drive inflation up to 4% by the end of this year and will remain at that level until the second quarter of 2022. Inflation is then expected to gradually fall back towards the 2% target rate set by the government. The increase in inflation will mean certain costs for SSDC are



potentially higher in particular for those contracted services which specify an increase per annum in with the CPI and energy costs for running our buildings.

23. Construction inflation is also currently at record high levels (some 3% to 5%) and this has already had an impact on the Council's Regeneration Programme in terms of more capital budget being needed to deliver some of the projects, for example, for the Chard Public Realm works. A review will be undertaken on the overall current approved capital programme to assess whether some of the agreed budgets need increased approvals by Council.
24. Whilst the Bank of England's Monetary Policy Committee (MPC) voted unanimously on 23rd September 2021 to keep interest rates at the historic low rate of 0.1%, it did say that recent developments had "strengthened [the] case for a modest increase in the Bank's base rate in the next few years". Any increase in interest rates would have a net adverse effect on SSDC given the size of its borrowing needs in the short to medium term – both in terms of the interest rates needing to be paid out and on the MRP (Minimum Revenue Provision) costs needing to be financed by the revenue budget for the future repayment of the debt.
25. ***Our current assumptions on this issue are that:***

- i) *Inflation on goods and services will be higher than previously assumed in the MTFP – we have estimated 3% in 2022/23 falling back to 2% in 2023/24. Budget monitoring for the quarter 2 position will review whether any budgets are in stress for this financial year arising from increased inflationary cost pressures.*
- j) *Pay inflation – the MTFP currently assumes a pay award of 2% per annum. Local Government Employers proposed a final offer of 2.75% for SCP 1 (Scale Point) employees and 1.75% for SCP2 (and above) employees on 27th July 2021. The unions are currently conducting a ballot of their members on the proposal. More information will be known later on in the year.*
- k) *There will be an increase of 1.25% in Employer's National Insurance Contributions in 2023/24 to fund the recently announced Health and Social Care Levy proposed by central government.*
- l) *Using the advice of SSDC's Treasury Management Advisers, Arlingclose, and given the assumptions that (a) interest rate rises will be minor for the next two years and (b) SSDC will continue to service its borrowing needs by internal borrowing and short term local authority to local authority borrowing (see paragraph 71), we have assumed interest rates of 1.5% for our external borrowing (a 0.5% margin has been added to guard against potential volatility) and have used the interest rate for a 50 year PWLB loan (currently 2.13%) to calculate MRP costs.*

Spending Review

26. On the 7th September the government confirmed that a full Spending Review will be reported alongside the Budget on 27th October. It also published its overall spending



‘envelope’ – the total pot of money to be allocated between government departments including the Department for Levelling Up, Housing & Communities from which local government receives the bulk of its financial support.

27. These new spending plans cover 2022/23 to 2024/25 and represent a welcome return to multi-year budgeting as the last two reviews have only been one year reviews resulting in one year financial settlements to local government. This approach hinders medium term financial planning. However, given that Government has not begun consultation on introducing its reforms arising from the Fair Funding Review (see below) it is likely that another one-year financial settlement will be provided for 2022-23 with longer term funding reforms being introduced in 2023-24 at the earliest.
28. The published figures show that the Chancellor has increased his previous public finance expenditure plans by £14 billion per annum, representing the (gross) amount raised by the new Health and Social Care Levy (to be financed by a 1.25% increase in National Insurance). Overall public service spending will increase at an average real rate of 3.2% per year over the SR period. That will fund a substantial increase in health and social care funding, but will still leave overall public service spending £2 to £3 billion lower each year than what the government was planning to spend pre-pandemic. (Source: *Institute of Fiscal Studies*).
29. After accounting for the additional funding promised to health and social care, pre-existing commitments on schools, defence and overseas aid, and the Barnett formula, these plans still suggest a tight settlement elsewhere – at least in the short-term. The remaining, unallocated budget line – which includes ‘unprotected’ areas like local government, justice and further education, and also any additional virus-related spending – is virtually flat for the first two years.
30. ***Our current assumptions on this issue are that:***

m) <i>As it is too early to assess we have assumed that the Spending Review will have a neutral impact on SSDC’s budget position – so no increased funding has been anticipated but likewise no decreases have been assumed.</i>
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Changes to the local government funding regime

31. Government’s plans to reform local government finance have been twice delayed and there is growing consensus among local government finance specialists that it will be postponed for a third time to 2023/24 at the earliest. The reforms comprise:
 - **Fair Funding Review** – this review commenced in 2018 with the aim of setting new baseline funding allocations for each local authority based on their relative needs and available resources. The outcome of the review was to inform the funding settlement for Councils for 2020/21 but implementation has been delayed and to-date there has been no announcements or consultation on implementing the review for 2022/23. In the meantime all the data underpinning the allocations are becoming increasing out of date (the current allocations are based on 2012-13) and given that data collection was limited during the



pandemic, the most recent and complete set of data that could be used is from 2018/19.

- **Business Rates Retention and Baseline “Reset”:** The Government had planned to increase the percentage of Business Rates that Councils keep, from 50% to 75%, from 2020/21 and reset the baseline to redistribute funding to councils who are unable to grow Business Rates in their area. Again, this has been postponed and given the impact of Covid-19 on business and HM Treasury’s current fundamental review of the sustainability of business rates as a method of funding local government services (due to be published this autumn) it is not clear whether the Government will continue to pursue this reform.
- **New Homes Bonus:** The then Secretary of State for Housing, Communities and Local Government announced a one-year allocation of New Homes Bonus as part of the Financial Settlement for 2021/22. The Government opened consultation on the future of the New Homes Bonus and possible changes to the grant in February 2021. This consultation is now closed and no announcements have, to-date, been made by government on this. It is expected that the New Homes Bonus funding will be wrapped up within the Fair Funding Review in following years. It is unclear how the Government will incentivise local authorities to deliver additional housing within the new funding regime.

32. ***Our current assumptions on this issue are that:***

- n) *Settlement funding from central government will roll forward and continue into 2022/23 on the same principles that were applied in 2021/22. So:*
 - ✓ *No repayment of negative RSG (Revenue Support Grant) of £327k until 2023/24*
 - ✓ *Receipt of NHB legacy payment of £557k in 2022/23 with that grant no longer being received in 2023/24 and onwards*
 - ✓ *Receipt of Rural Services Delivery Grant in 2022/23 of £175k*
 - ✓ *No receipt of Lower Tier Payments Grant in 2022/23 as this was a new grant for this financial year*
- o) *Changes to the local government finance regime will be made for 2023/24 onwards including the adverse impact of a Business Rates base line reset for SSDC estimated to be some £2.3m.*

Changes to legislation and statute

33. On 26th November 2020 HM Treasury introduced changes to PWLB (Public Works Loans Board) lending terms which effectively mean that any new “investment purely for yield” commercial activity after that date cannot be financed using PWLB borrowing – the source most used by councils to obtain loan finance. The restriction also applies to other capital expenditure (for example regeneration and leisure projects), if the council has “investment purely for yield” activity in its capital programme in that financial year.

34. In order to get a PWLB loan:



South Somerset District Council

- Councils must submit a high-level description of their capital spending and financing plans for the following 3 years.
 - The S151 Officer must certify that the borrowing is not to be used to fund investment assets with the primary objective of generating yield.
35. HM Treasury has defined “*investment primarily for yield*” as an investment that has one or more of the following characteristics:
- Buying land or existing buildings to let out at market rate.
 - Buying land or buildings that were previously operating on a commercial basis which is then continued by the Council without any additional investment or modification.
 - Buying land or buildings other than housing that generate income and are intended to be held indefinitely.
36. PWLB will continue to support the following categories of spending as long as there is no “investment purely for yield” activity planned in the budget: service spending, housing, economic regeneration, preventative action, treasury management (e.g. refinancing of existing debt). Recent clarifications from HM Treasury have led to the understanding that debt existing before the 26th November 2020 arising from “investment purely for yield” can be refinanced using PWLB loan finance.
37. If the PWLB loan is misused HM Treasury may request the Local Authority to unwind the transaction, to repay the PWLB loan, or block future access to PWLB lending.
38. Changes will also be made later this year to CIPFA’s (Chartered Institute of Public Finance and Accountancy) Prudential Code to come into effect, it is believed, in 2022/23. English and Welsh local authorities are required by regulation to “*have regard to*” the Prudential Code when carrying out their duties under Part 1 of the Local Government Act 2003. Councils can choose not to implement the Code but must state why they are not doing so.
39. The changes aim to define more clearly, with examples, on what borrowing activities, commercial activity, and investment are permitted by local authorities and will prohibit borrowing “to invest for the primary purpose of commercial return”.
40. Other key changes that will be implemented include:
- The inclusion of proportionality as an objective, so that an authority incorporates an assessment of risk against levels of resources.
 - The introduction of the Liability Benchmark as a Treasury Management indicator for local government bodies. This is calculated as the CFR (indebtedness) less reserves and working capital needs and effectively shows the minimum level of external debt that needs to be borrowed. This is to be shown graphically, unlike the tabular format of other indicators, and should extend for at least ten years into the future, which will make it more complex to produce and maybe more difficult to explain.

41. ***Our current proposals on this issue are that:***

- p) Council will be asked as part of the February Budget Report to cease “investment purely for yield” commercial activity from 2022/23 onwards.
- q) That any expenditure from the remaining existing capital budget for “investment purely for yield” (currently £18.3m) will need to be completed by 31 March 2022.

2020/21 Outturn Position

Revenue Expenditure

42. Total net revenue expenditure for 2020/21 was **£15.554m** resulting in a balanced year end outturn position against the approved net budget. Table 1 gives an analysis of the outturn for each Directorate. Gross expenditure was **£80.986m**. Pie Charts 1 and 2 give a summarised analysis of how this money was spent and how it was financed.
43. The figures shown above includes the use of £4.695m of additional funding from government received during the year to support the Council during the Covid 19 pandemic. If it were not for this financial support the Council would have significantly exceeded its approved net revenue budget by £4.330m.

Table 1: Revenue Budget Net Outturn for 2020/21

Directorate	Approved Budget £	Actual Net Spend £	COVID Grant Allocation £	Budget Carry Forwards £	2020/21 Outturn £
Chief Executive	429,860	802,551	0	0	802,551
Strategy & Commissioning	3,353,300	3,872,216	-707,559	83,370	3,248,027
Support Services	1,992,460	1,173,206	-310,940	0	862,266
Service Delivery	3,272,940	4,896,664	-752,351	230,310	4,374,623
Commercial Services & Income Generation	6,505,260	9,139,470	-2,924,302	51,180	6,266,348
Total	15,553,820	19,884,107	-4,695,152	364,860	15,553,815

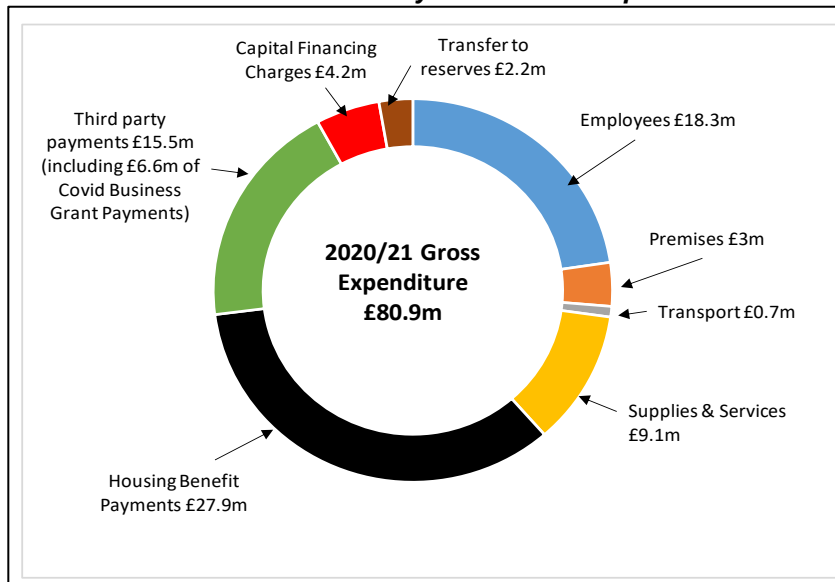
44. Covid 19 had a significant impact on the Council’s finances during 2020/21 including:
- Lost income from the Octagon Theatre and Westlands Entertainment Venue as the venues had to be closed for the majority of the year.
 - Reduced income from fees, charges and rental income in general but from car parking and Building Control in particular.
 - Increase in the Bad Debts provision for Council Tax due to a decision to suspend recovery for most of the year.
 - Providing financial support to the Council’s Leisure Centres’ operator during the lockdowns.



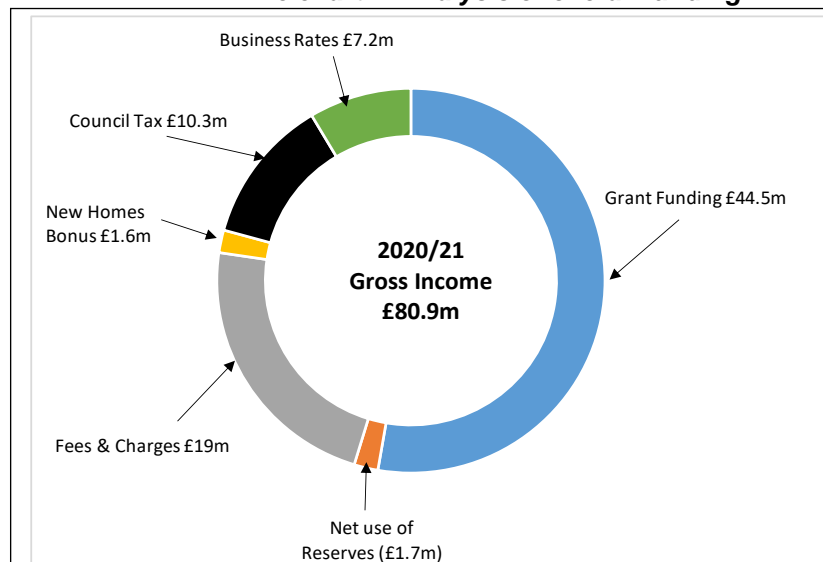
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- Additional costs incurred by Somerset Waste Partnership in respect of kerbside collections and recycling sites.
- Additional payments made under the Discretionary Housing Payments Scheme and Council Tax Support Scheme (CTS).
- Underachievement of the 2020/21 additional income/savings target agreed in the budget.

Pie chart 1: Analysis of Gross Expenditure



Pie chart 2: Analysis of overall funding



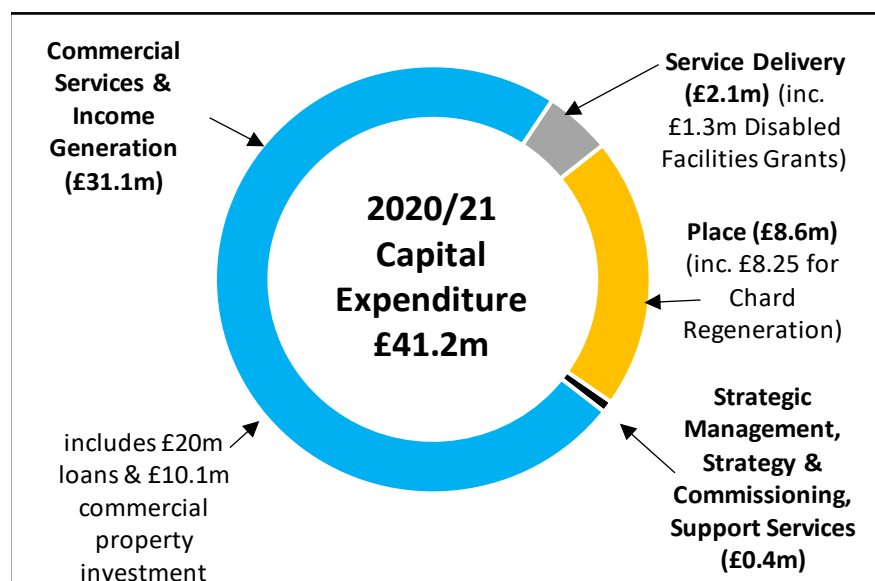
Collection Fund

45. The Covid-19 pandemic has also significantly impacted Business Rates income collection. The 2020/21 outturn is a deficit position of £10.2m largely arising from central government's decision to grant reliefs to retail, leisure, and hospitality businesses during the year. The Council has received £11.8m of Section 31 grant to compensate for the loss of income arising from this decision. Owing to the complex accounting arrangement for Business Rates this income has to be accounted for in 2021/22 and the subsequent two years and therefore this amount has been transferred to an earmarked reserve.

Capital Expenditure

46. Total capital spending for 2020/21 was **£42.177m**; this was £22.628m (116%) more than the original £19.549m of planned expenditure agreed by Council in February 2020. (Increases to the February approved budget are agreed by District Executive each quarter when Council-approved "reserved schemes" are ready to be included in the capital budget).

Pie chart 3: 2020/21 capital expenditure



Capital Financing

47. The financing of the 2020/21 capital programme is illustrated in pie chart 4. Prudential borrowing funded 90% of the expenditure incurred. With the amount borrowed, of £38m, being a combination of internal and external borrowing, with the split being 51% / 49% respectively.
48. Internal borrowing is when the Council uses its cash balances to temporarily fund its need to borrow. These cash balances need to be replenished either when overall Council cash reserves are low or when a strategic decision is made to obtain external long-term loan finance, so the borrowing is only temporary. The Council

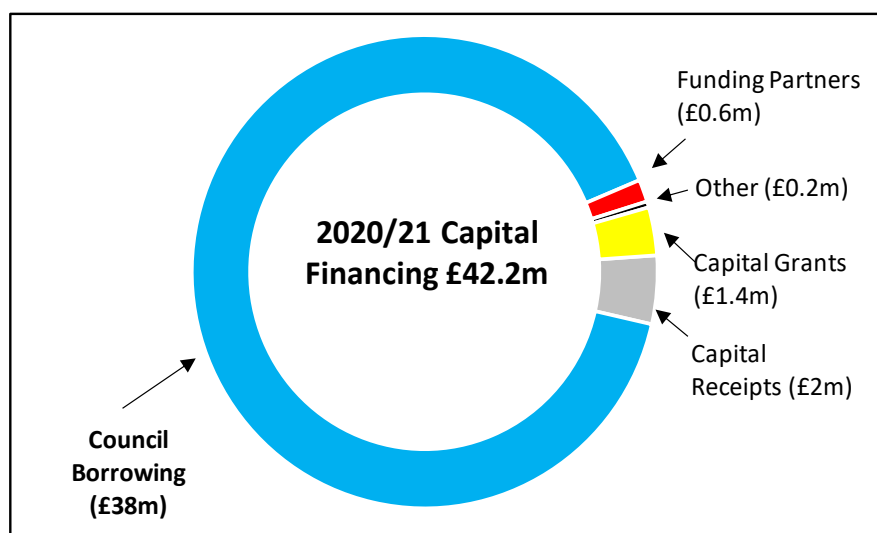


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undertakes weekly forecasting of its cash position in order to ascertain when any borrowing is required.

49. External borrowing is the action of obtaining loan finance from a third party. Currently SSDC meets its external borrowing needs through short-term loans taken out on a rolling basis with other local authorities.

Pie chart 4: Funding of 2020/21 capital expenditure



Current Year's (2021/22) Financial Position

Revenue Expenditure

Table 2: Forecast outturn for 2021/22 as at end of Quarter One

Table A	Year to date - April to July 2021			Forecast Outturn 2021/22		
	Budget	Actual	Variance	Budget	Forecast	Variance
Expenditure						
Employees	£6,118,785	£6,090,876	(£27,908)	£17,889,560	£18,969,710	£1,080,150
Premises	£1,529,592	£1,597,732	£68,141	£3,166,210	£3,159,002	(£7,208)
Transport	£291,816	£178,733	(£113,083)	£979,520	£780,920	(£198,600)
Supplies & Services	£2,586,554	£2,825,392	£238,838	£6,973,410	£6,615,566	(£357,844)
Third Party Payments	£2,662,052	£2,479,991	(£182,060)	£7,902,240	£8,008,613	£106,373
Housing Benefits payments	£8,426,050	£8,010,567	(£415,483)	£26,658,150	£26,658,150	£0
Capital Financing	£80,893	£21,783	(£59,110)	£2,923,000	£2,923,000	£0
Revenue Reserve transfers	(£293,377)	(£134,941)	£158,436	£1,478,050	£1,478,050	£0
	£21,402,365	£21,070,134	(£332,230)	£67,970,140	£68,593,011	£622,871
Income						
Government grants	(£9,357,457)	(£10,158,712)	(£801,254)	(£28,228,600)	(£29,182,100)	(£953,500)
Other grants and contributions	(£180,729)	(£691,765)	(£511,036)	(£1,114,140)	(£1,114,140)	£0
Sales	(£700,732)	(£549,424)	£151,308	(£2,046,660)	(£1,937,442)	£109,218
Fees and charges	(£6,351,285)	(£6,548,605)	(£197,319)	(£17,689,490)	(£16,556,280)	£1,133,210
Investment income	(£214,824)	£1,253,019	£1,467,843	(£2,148,240)	(£2,928,240)	(£780,000)
	(£16,805,027)	(£16,695,487)	£109,541	(£51,227,130)	(£51,718,202)	(£491,072)
Net Budget	£4,597,337	£4,374,648	(£222,689)	£16,743,010	£16,874,809	£131,799

50. The Quarter One budget monitoring report presented to District Executive in September 2021 showed an overall forecasted underspend position of £132k. Whilst this is still early in the financial year significant variances are being estimated



which may indicate that the budget is not robust and will need realignment via a revised estimate approval by Council.

51. The areas concerned, along with the rest of the agreed budget, will be scrutinised in detail with the budget managers during the Quarter Two budget monitoring process to ensure that the variances remain valid. Any realignment of the 2021/22 budget via a Revised Estimate requirement will seek agreement from District Executive and Council in December of this year.

Capital Expenditure

52. The next monitoring position regarding this year's capital programme will be given to District Executive in November when the position as at quarter two will be presented.
53. Revised capital estimates for 2021/22 will go to Council for approval in December 2021 in order to incorporate:
- £29.5m of new projects/expenditure individually agreed by Council since February 2021: Octagon Theatre (£23.1m), Leisure Centres Refurbishment (£3.5m), Yeovil Refresh (£2.6m), and Chard Public Realm Improvements (£0.4m).
 - Spending of up to £18.3m on "investment purely for yield" (to bring total spend up to the £150m total previously agreed by Council in its commercial strategy).
 - Slippage from 2020/21 and rephasing of projects agreed in February 2021 into future years.
 - The inclusion of gross expenditure budgets for all of the Regeneration Projects instead of the net budgets previously shown in the capital programme.
54. Given that the Council's borrowing needs are currently estimated to increase by some 35% (as measured by the Capital Financing Requirement) from £134m as at the end of 2020/21 financial year to £181m as at the end of 2023/24, the section 151 Officer and other Senior Leadership Team members are currently reviewing the extent to which SSDC's capital reserves, along with the use of exiting CIL money (Community Infrastructure Levy), can be utilised to finance the existing Regeneration Programme in order to reduce the Council's (and the new authority's) borrowing needs. The outcomes from this review will be included in the Draft Budget report for District Executive's meeting in December 2021.

MTFP Refresh 2021/22 – 2023/24

Revenue Expenditure

55. Table 3 gives a summary of the approved 2021/22 budget, the 2021/22 budget position as at 31st July, and the MTFP projections rolled forward from the 2021/22 Original Budget for 2022/23 and 2023/24. At this point in time we have made the assumption that the current estimated movements in the budget for this financial year will not continue into the 2022/23 financial year. Tables four and five includes more detail of the figures summarised below.

56. It should be noted that the current MTFP model uses the 2021/22 Original Approved Net Budget as the “base budget” with forecast changes being added or detracted from that starting point. This is called incremental budgeting and is widely used in local government. It is the intention however of the interim S151 Officer to renew the model used so that it produces forecasts on a subjective cost and income basis – so for example, the model would forecast the total costs for employees salary, National Insurance costs, and Pension Fund contributions as separate lines in the model. This type of modelling will give SSDC Members enhanced understanding and transparency of the figures and will also make it easier to share our budget plans with other Somerset Councils as part of the local government reorganisation requirements.

Table 3: 2021/22 budget and MTFP projections 2022/23 and 2023/24

	Original Approved 2021/22	Estimated Movement	2021/22 Position as at 31 July 2021	2022/23 Estimate	2023/24 Estimate
	£	£	£	£	£
Total Net Budget Requirement	16,743,010	1,352,210	18,095,220	17,537,000	18,371,310
Funding					
Grants	-1,501,690	0	-1,501,690	-731,500	327,285
Business Rates Retention	-5,824,873	0	-5,824,873	-6,025,994	-3,902,282
Council Tax	-10,717,653	0	-10,717,653	-11,069,694	-11,424,663
Collection Fund Deficit	8,997,942	1,725,028	10,722,970	757,002	606,562
Sub-total: Funding	-9,046,274	1,725,028	-7,321,246	-17,070,186	-14,393,098
Other Reserve Transfers	-7,696,736	-3,077,238	-10,773,974	310,678	-246,322
Total Funding	-16,743,010	-1,352,210	-18,095,220	-16,759,508	-14,639,420
Budget Gap (Cumulative)	0	0	0	777,492	3,731,890
Budget Gap Increase on Prior Year				777,492	2,954,398

57. The roll forward position shows an indicative budget gap position of some £0.8m for 2022/23 with a further increase of £3m in 2023/24 (the latter increase largely being the result of the estimated adverse impact any Business Rates baseline reset will have on the council’s finances). The figures reported to Council in February 2021 were £1.2m and £0.05m respectively.
58. However these figures are at a very preliminary stage in the budget setting process. As mentioned in the previous section of the report, there are significant forecast variances being reported for this financial year that need further review and may impact on 2022/23 onwards. These include:
- A forecast overspend of £1.1m in the employee’s budget arising primarily from the need to use interim staff in Development & Building control.
 - £1.1m of the Fees & Charges income budget is estimated as not being achievable. The 2021/22 income budget already incorporates an assumed loss of income of £1.3m arising from the impact of Covid 19.



- Investment Income is forecast to achieve more than the agreed budget by £780k.

Table 4: Net Budget Requirement 2021/22 to 2023/24

	Original Approved 2021/22	Estimated Movement	2021/22 Position as at 31 July 2021	2022/23 Estimate	2023/24 Estimate
	£	£	£	£	£
Base Net Budget	15,207,150		15,207,150	16,743,010	17,537,000
Employment cost inflation	914,670	1,041,000	1,955,670	335,700	435,940
Inflation allowance on contracts	193,730	0	193,730	198,290	198,370
Unavoidable budget pressures	354,520	0	354,520	300,000	200,000
Planned savings	100,000	0	100,000	0	0
Investment Income - Treasury Management	-100,000	-780,000	-880,000	0	0
Investment Income - Property Portfolio	-1,919,870	0	-1,919,870	0	0
Investment Income - Third Party Loans	-452,440	0	-452,440	0	0
Revenue effects of Capital Programme	1,482,550	0	1,482,550	0	0
Other adjustments from base	-317,200	0	-317,200	-40,000	0
Forecast loss fees & charges income	1,279,900	1,091,210	2,371,110	0	0
Total Net Budget Requirement	16,743,010	1,352,210	18,095,220	17,537,000	18,371,310

59. Work is currently being undertaken to assess the financing charges budget given that the borrowing needs of the council have increased significantly in recent months (arising largely from the deep dive reviews undertaken of the Regeneration Programme’s funding arrangements by the Director of Place and Recovery and the interim S151 Officer). The income that can be anticipated from our loan arrangements to SSDC Opium Limited along with any dividend income that may be received is also “work in progress” at this stage although the likelihood is that significant additional income from these sources will be included in the budget for next year onwards.
60. As mentioned at paragraph 16 above, the MTFP Refresh figures do not yet include the costs required to implement local government reorganisation, provisions to offset the effects of diverting SSDC capacity (which might otherwise impact on service delivery) and other potential consequential costs to this Council. Formal provision at this stage is considered premature with the scope and scale of the expenditure needed still being reviewed. It is intended that these budget provisions will be made in the December Draft Budget report to District Executive and Council.
61. In addition the assumptions made about the timing and impact of the local government funding reforms, discussed in paragraphs 31 and 32 above, could change in the next iteration of the MTFP. There is no clarity on whether these reforms will be implemented in 2023/24 and there is no consensus about this issue in the current MTFP positions being reported across Somerset’s councils. A consistent pan-Somerset approach to this and other financial issues in the forward 2023/24 indicative budget estimates would be helpful in drawing up the consolidated budget for the first year of the new unitary council: the Section 151 Officer will



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collaborate with other S151 Officers on this as part of the local government reorganisation programme.

Table 5: Funding 2021/22 to 2023/24

	Original Approved 2021/22	Estimated Movement	2021/22 Position as at 31 July 2021	2022/23 Estimate	2023/24 Estimate
	£	£	£	£	£
Funding					
Revenue Support Grant	0	0	0	0	327,285
Rural Services Delivery Grant	-174,500	0	-174,500	-174,500	0
Lower Tier Services Grant (new 2021/22)	-156,180	0	-156,180	0	0
New Homes Bonus Grant	-1,171,010	0	-1,171,010	-557,000	0
Business Rates Retention	-5,824,873	0	-5,824,873	-6,025,994	-3,902,282
Collection Fund Deficit - Business Rates	8,885,872	1,725,028	10,610,900	546,322	546,322
Council Tax	-10,830,786	0	-10,830,786	-11,184,239	-11,540,552
Less: Council Tax Paid to SRA	113,133	0	113,133	114,545	115,889
Collection Fund Deficit - Council Tax	112,070	0	112,070	210,680	60,240
Sub-total: Funding	-9,046,274	1,725,028	-7,321,246	-17,070,186	-14,393,098
Other Reserve Transfers					
MTFP Support Fund Reserve	162,497	-757,210	-594,714	557,000	0
BRR Volatility Reserve	-8,885,872	-1,725,028	-10,610,900	-546,322	-546,322
Other Earmarked Reserves	1,026,640	-595,000	431,640	300,000	300,000
General Fund Balance	0	0	0	0	0
Sub-total: Net Reserve Transfers	-7,696,736	-3,077,238	-10,773,974	310,678	-246,322
Total Funding	-16,743,010	-1,352,210	-18,095,220	-16,759,508	-14,639,420
Budget Gap (Cumulative)	0	0	0	777,492	3,731,890
Budget Gap Increase on Prior Year				777,492	2,954,398

Capital Expenditure

62. The MTFP Refresh does not include any new capital expenditure plans. Senior Leadership Team will be asked to confirm whether there are any urgent and essential capital proposals, which can largely be delivered by the end of March 2023 that will need Council approval to include in the current capital programme.

Reserves

63. **Revenue Reserves:** The General Fund Balance was £4.314m as at the end of the year (previous year's position was £5.1m). £1.86m was transferred out of the Balance in 2020/21 to fund the overall revenue budget. The MTFP Refresh assumes that this balance is not used over the planning period.
64. Revenue earmarked reserves total £38.465m as at end of March 2021 (they were £21.877m as at the end of March 2020). The increase in earmarked reserves includes £11.84m of Section 31 grant income from central government as described

in paragraph 45. The largest earmarked reserves, excluding the “one-off” Section 31 Grant reserve, are:

- Commercial Risk Reserve - £6.606m
- MTFP Support Fund - £4.880m
- NNDR Volatility Reserve - £4.592m
- Regeneration Fund - £2.997m
- CT/Housing Benefits – £1.291m
- Capital Reserve - £1.164m

65. Senior Leadership Team has recently agreed to undertake enhanced corporate monitoring of the use of earmarked reserves (the use of which, under the Financial Procedure Rules, are delegated to Directors as long as they are used for the purpose for which they were originally established). It is intended to fully incorporate the planned use of earmarked reserves into the budget position in the 2021/22 revised estimates and 2022/23 budget estimates in order to provide fuller clarity on their use and the expenditure which they are financing.
66. **Capital reserves:** largely comprise of unused capital receipts (that is the sales proceeds from selling assets). The reserves were £18.222m as at the end of last financial year). At this point in time some £8.1m of this total would be needed to fund the agreed capital programme.
67. SSDC therefore has a healthy reserves position which it has proactively built up over the last few financial years. A desktop exercise was recently undertaken by the Section 151 Officer to compare SSDC’s reserves with the other Councils in Somerset to further assess the financial robustness of the council. The exercise was undertaken using unaudited published Statement of Accounts and omits, for all authorities, the significant “one-off” Section 31 Grant reserves mentioned in paragraph 45 above.

Table 6: Reserves held by the Somerset Councils as at end of 2020/21

	South Somerset	Mendip	Sedgemoor	Somerset West & Taunton	Somerset County Council
General Fund Revenue Reserves	£31.1m	£13.4m	£23.4m	£27.0m	£122.0m
Net Revenue Expenditure Budget	£15.6m	£19.6m	£29.9m	£21.1m	£340.7m
% of Reserves compared to Net Revenue Expenditure Budget	199%	68%	78%	128%	36%
Capital Reserves	£18.2m	£2.3m	£0.5m	£33.3m*	£13.6m

NB: Some of Somerset West & Taunton’s capital reserves will belong to their Housing Revenue Account, rather than the General Fund – but the amount cannot be determined from their accounts

68. Whilst the figures are not yet finalised, it is anticipated that SSDC will need to use a significant amount of its reserves over the next two years for the following:
- Financing the costs of local government reorganisation.
 - Financing increased capacity to enable the ongoing delivery of council services.



- Funding any budget gap for this and next financial year.
- Using capital reserves to fund SSDC's existing capital budget so as to reduce the level of borrowing required to the benefit the revenue budget of this council and that of the new unitary council.

69. The draft budget report to be considered by District Executive on 2nd December 2021 will contain fuller information on these issues.

Borrowing Strategy

70. Given the changes to PWLB lending terms and the intended changes to CIPFA's Prudential Code described in paragraphs 33 to 41 above, Arlingclose, the Council's Treasury Management adviser, was asked earlier this year by the S151 Officer to review the Council's potential borrowing options given that SSDC is, at least for this financial year, actively seeking to undertake further "investment purely for yield" commercial activity.
71. Arlingclose analysed a range of potential borrowing options including the use of: PWLB (Public Works Loans Board), local authority to local authority short term lending, borrowing from Financial Institutions (e.g. Pension Funds, banks), a Bonds issue (either separately or using the Municipal Bonds Agency), Forward Starting Loans, Interest Rates swaps, and income strip deals (wrapper leases).
72. The Section 151 Officer will be proposing to February 2022 Council (in the Treasury Management Strategy) that we keep to our current approach to borrowing namely: to (a) only borrow externally when cash flow requires this and to (b) only borrow short term from other councils. Obviously we will continue to review this approach with Arlingclose in light of any changes in market/economic conditions but the intention is that for the next two years SSDC will not enter into any long term borrowing arrangements.
73. The rationale for proposing this approach can be given as follows:
- Short term borrowing from other councils is currently by far the cheapest option and is readily available and quick to administer.
 - Whilst there is a risk to SSDC if interest rates rise, this is assessed as a low risk by Arlingclose and other economic forecasters.
 - Other options, e.g. bond issues, interest rate swaps, will take officer time and cost to implement.
 - Income strip deals (wrapper leases) are intrinsically risky.
 - HM Treasury have recently clarified their new PWLB lending terms and have confirmed that PWLB lending is available to finance existing debt arising from past "investment purely for yield" commercial activity and to finance the council's capital programme the year after it ceases such commercial activity, if the Council so wishes.
 - The S151 Officer advises that it would be wrong to fetter the future flexibility of the successor unitary authority in this matter if there is no immediate need for SSDC to enter into long term borrowing arrangements.

Business Rates Pool for 2022/23

74. A Somerset Business Rates Pool (comprising the County Council and the Districts within the County Council area) has provided a positive impact on retained funding from Business Rates since 2018/19, retaining more funding locally rather than redistributed to central government. The pooling arrangement remains in place for 2021/22. The Council's financial plans include an actual gain of £811k in 2021/22 and an estimated gain of £1m for 2021/22 as a contribution towards funding SSDC's Regeneration Programme. Actual gains are not confirmed (and received) until the end of each financial year.
75. An "in principal " decision to continue being a member of the Somerset Business Rates Pool is required by 8th October 2021 with confirmation of this required within a week of receiving the final finance settlement from central government (in January 2022). It is the understanding of the interim S151 Officer, that colleagues across the Somerset Councils will be recommending that the Pool continues in 2022/23 with the same membership and same sharing arrangements in place. Further information on this will be given in the Draft Budget report to District Executive in December 2021.

Next Steps Timeline

76. The next steps are shown in the table below.

Table 7: Next Steps Timeline

Quarter Two revenue and capital budget monitoring reports	District Executive – 4 th November 2021
Draft Budget Report Revised estimates for 2021/22 and draft proposals for 2022/23 revenue and capital budgets to include: <ul style="list-style-type: none"> • Revenue Budget Growth proposals • Revenue Budget Savings/new income proposals • New and revised capital project proposals • Any information gained on the Local Government 2022/23 Finance Settlement • Information on the costs of Local Government Reorganisation and capacity needs to deliver council services • Proposed Council Tax increase • Latest estimates for Collection Fund • Proposed use of Reserves 	District Executive - 2 nd December 2021 Council - 16 th December 2021 (to agree 2021/22 Revised Estimates)



Council Plan Implications

The MTFP incorporate costs, income and funding implications directly related to the delivery of the Council's aims and priorities. The Council Plan for 2022/23 is due to be presented to Council for approval in February 2022 at the same time as the final budget.

Carbon Emissions and Climate Change Implications

Not applicable within this report.

Equality and Diversity Implications

Not applicable within this report.

Privacy Impact Assessment

Not applicable within this report.

Background Papers

Budget Setting reports to Full Council in February 2020, February 2021

Establishment of a Joint Committee in Somerset for the implementation of local government reorganisation

Executive Portfolio Holder:	Val Keitch – Leader of the Council
Strategic Director:	Jane Portman – Chief Executive Officer
Lead Officer:	Jill Byron – Monitoring Officer
Contact Details:	Jill.Byron@southsomerset.gov.uk

Purpose of the Report

1. To seek approval for the establishment of a Local Government Reorganisation Joint Committee (LGR Joint Committee) with Mendip District Council, Sedgemoor District Council, Somerset County Council and Somerset West and Taunton District Council (collectively, with the addition of South Somerset District Council, the Constituent Councils).

Recommendations

2. That the District Executive recommend that the Chief Executive agree to establish the LGR Joint Committee with representation from the Constituent Councils, constituted in accordance with and having the delegated Executive functions set out in the Terms of Reference attached as Appendix 1.

Note: this decision will only come into full effect on 25 October 2021 after all the Constituent Councils have met and agreed to the Terms of Reference.

Background

3. Following the Secretary of State's announcement that there would be a single unitary council for Somerset with effect from 1 April 2023, the Constituent Councils have been working collaboratively and with the Department for Levelling Up, Housing and Communities (DLUHC) on the process of transition to the new authority. DLUHC are currently discussing the proposed Structural Change Order (SCO) with the Constituent Councils. The SCO, which will be laid before Parliament for approval in the New Year, will set out the arrangements for the transfer of the functions, property, assets, rights, liabilities and investments of the Constituent Councils to the unitary council. The SCO will also set out the governance arrangements for the transitional period until the unitary council is established in April 2023.

Note: the DLUHC has replaced the former Ministry for Housing, Communities and Local Government (MHCLG).

4. The Constituent Councils will need to take a number of actions and decisions before the SCO becomes law. To enable such decisions to be taken collectively and in an efficient and timely manner, requires a collaborative and democratic governance framework. The LGR Joint Committee will not only provide collaborative democratic oversight and transparency for these actions and decisions, it will also be a positive response to DLUHC's expectations for collaborative arrangements to be established as early as possible in any LGR implementation programme.
5. The Terms of Reference set out the membership, functions and operations and meeting and voting arrangements of the LGR Joint Committee. Somerset County Council will administer the LGR Joint Committee, but the finance, legal and governance teams of the Constituent Councils will provide collaborative support and advice to support the LGR Joint Committee. The Constituent Councils' legal teams and Monitoring Officers have been involved in the development of the Terms of Reference, which were then informally approved by the Leaders and Chief Executives.
6. The functions set out in the Terms of Reference have been designed to align with the anticipated form of the SCO on the basis of LGR in other areas. Until the arrangements set out in the SCO take effect, the main functions of the LGR Joint Committee will be to:
 - (i) oversee the implementation plan for the new unitary authority;
 - (ii) oversee liaison with DLUHC, particularly on the SCO, and the development of the new unitary council's constitution;
 - (iii) develop organisational and partnership policies and protocols to support the implementation of the unitary council;
 - (iv) be consulted on, and have an opportunity to make representations to, the Constituent Councils in relation to the setting of 2022-23 annual budgets and any medium term financial plans.
7. LGR Joint Committee meetings will be open to the public and will take place in venues around the county.

An Update on Scrutiny

8. The leaders of the Constituent Councils have separately expressed a wish to set up a joint scrutiny committee to oversee the work of the LGR Joint Committee. While the LGR Joint Committee will exercise executive functions only and can therefore be established by executive decision, a joint scrutiny committee may only be established by a decision of full council. If this proposal to establish the LGR Joint Committee is approved by the Constituent Councils, a proposal for an LGR Joint Scrutiny Committee will be prepared for consideration at full council meetings in November/December 2021.

An Update on the SSDC Member Working Group

9. On 19 August 2021, Council agreed to establish a member working group to work with the Leader, Chief Executive and Monitoring Officer in considering the Structural Change Order, comprising the Leader of Council, the Deputy Leader, the Leader of the Conservative Group and the Leader of the Independents. Once the LGR Joint Committee meeting dates are known, working group meetings will be arranged to support this work.

An Update on the Informal Advisory Board

10. The Leaders and CEOs of the Constituent Councils have agreed to set up an LGR Advisory Board of elected members and stakeholders. The Board will be advisory only and will not have decision making or scrutiny powers. Detailed terms of reference for the LGR Advisory Board are being developed, but an initial note is set out in Appendix 2. Councillor Graham Oakes has been nominated to the Board. Board meetings will be public and the dates will be circulated once known.

Legal Implications

11. The LGR Joint Committee will be a joint committee of the Executives of the Constituent Councils for the purposes of Part VI of the Local Government Act 1972 and Part 1, Chapter 2 of the Local Government Act 2000 and the provisions applicable to joint committees of the executive will apply to the LGR Joint Committee. The LGR Joint Committee will therefore exercise those functions delegated to it by the Constituent Councils on their behalf and without further (formal) recourse to them. These functions and proposed joint committee arrangements therefore only require approval by each Executive or Cabinet.

Financial Implications

12. The financial implications of this decision are limited. Under the Terms of Reference the County Council will administer the LGR Joint Committee. The LGR Joint Committee will have power, using any delegated budgets, to agree spending commitments during the transition period to support the implementation of the unitary council. It is proposed that the Constituent Councils support the LGR Joint Committee to develop a 2023/24 budget for the unitary council.

Risk

13. The creation of a Joint Committee will place a formal governance structure around the preparations for the implementation of the new unitary council. This should enable a transparent, open, democratic and accountable culture around LRR and reduce risk.



Carbon Emissions and Climate Change Implications

14. There are no carbon emissions or climate change implications in this report.

Equality and Diversity Implications

15. Under the Terms of Reference, the LGR Joint Committee will take decisions having regard for Human Rights law and for the Constituent Councils' Public Sector Equality Duties. Before making any decision, the Joint Committee will take into account the equalities implications of that decision

Privacy Impact Assessment

16. There are no privacy impact implications

Background Papers

None

Local Government Reorganisation Joint Committee – Terms of Reference

Purpose

1. Mendip District Council, Sedgemoor District Council, Somerset County Council, Somerset West and Taunton Council and South Somerset District Council will establish an executive joint committee, known as the Local Government Reorganisation Joint Committee (LGR Joint Committee) for the purpose of discharging the functions set out in paragraph 17 below in relation to the implementation of the Secretary of State's decision to implement a single tier of local government in Somerset and any related matters.
2. The LGR Joint Committee is a joint committee of the executives of the councils for the purposes of Part VI of the Local Government Act 1972 and Part 1, Chapter 2 of the Local Government Act 2000 and the provisions applicable to joint committees of the executive will apply to LGR Joint Committee.
3. The LGR Joint Committee will take decisions in accordance with the principles of good decision-making namely:
 - giving consideration to all options available;
 - having regard to due consultation;
 - giving consideration to professional advice from officers;
 - having clarity of aims and desired outcomes;
 - that the action proposed must be proportionate to the desired outcome;
 - having respect and regard for human rights and for the councils' Public Sector Equality Duties;
 - a presumption in favour of openness, transparency and accountability;
 - only relevant matters being taken into account;
 - due weight being given to all material considerations (including opportunities and risks);
 - proper procedures being followed.

Term

4. The LGR Joint Committee will exist until the provisions of the Structural Change Order ("SCO") which establish the Implementation Executive (or another body named in the SCO) as the committee responsible for the discharge of the main transitional function throughout the period of transition to the new unitary council in Somerset come into effect.

Membership and voting

5. The LGR Joint Committee will be made up of 9 members drawn from the existing authorities as follows:

- the Leader of Somerset County Council ex officio;
 - 4 other members of the executive of Somerset County Council (to be nominated by the Leader of that Council);
 - the Leaders of each of the 4 district councils ex officio.
6. Each member will have one vote.
 7. In the event of a non-ex officio member of the LGR Joint Committee ceasing to be a member or executive member of their appointing council, that council shall appoint another member in their place.
 8. Each council leader may designate members of their executive to act as substitutes for the member(s) appointed under paragraph 5 above if the appointed member(s) is unable to attend a meeting of the LGR Joint Committee. Substitutions may only be made on a meeting-by-meeting basis. Any substitutions must be notified to the Monitoring Officer of Somerset County Council by 9.00am on the day of the relevant meeting.
 9. For the avoidance of doubt, it is a matter for the respective councils' leaders to appoint their members/substitutes.
 10. The Chairperson of the LGR Joint Committee will be the leader for the time being of Somerset County Council. The Vice Chairperson will be elected by the LGR Joint Committee at its inaugural meeting. If neither the Chairperson nor the Vice Chairperson are present, the LGR Joint Committee will elect a Chairperson for the meeting from the members present.
 11. The quorum for the LGR Joint Committee will be 5 members, including at least 1 member from a district council. Unless the law provides otherwise, all matters shall be decided by a majority of the votes of the members present and voting; if there are equal numbers of votes for and against, the Chairperson of the meeting shall exercise a second, casting vote.

Meeting arrangements

12. Somerset County Council will act as administering authority to the LGR Joint Committee and provide all necessary governance support.
13. The LGR Joint Committee will meet at least monthly and otherwise as may be determined by the Chairperson. Where either a majority of members or at least three district council members submit a signed request for an extraordinary meeting in writing to the Chairperson (or the Vice-Chairperson in the absence or incapacity of the Chairperson), the Chairperson (or Vice-Chairperson as the case may be) must make arrangements to call an extraordinary meeting within 10 calendar days of receiving the request.
14. The administering authority will give notice of time, date and venue for the meetings in accordance with the provisions of the access to information



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requirements of the Local Government Act 2000 as amended and ensure compliance with The Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012.

15. At the inaugural and subsequent meetings of the LGR Joint Committee the standing orders of the LGR Joint Committee will be those of Somerset County Council. The LGR Joint Committee may at any time approve its own set of standing orders which will take effect thereafter or at such other time as the LGR Joint Committee may determine.
16. Meetings of the LGR Joint Committee could take place in a number of locations around the county of Somerset. The LGR Joint Committee will determine a programme of meeting locations for the period of its constitution at its inaugural and/or subsequent meetings.

Functions

17. The LGR Joint Committee will prepare for and facilitate the economic, effective, efficient and timely transfer of the councils' functions, property, assets, rights, liabilities and investments in relation to the reorganisation of local government in Somerset, and in particular will fulfil the following executive functions, at all times having regard to the duty to cooperate and to the views of the Local Government Reorganisation Advisory Board:
 - Oversee the Implementation Plan for the unitary council;
 - Agree the level of requests to be made to each Council for allocation from each council's revenue and capital allocations for the LGR Joint Committee, and subsequently the Implementation Executive to support delivery of the Implementation Plan;
 - Agree the allocation of revenue and capital expenditure to be made for delivery of the Implementation Plan from the budget delegated by each council to the LGR Joint Committee, and subsequently the Implementation Executive
 - Agree the form, function and constitution of Local Community Networks;
 - Approval of joint submissions to MHCLG in relation to the preparation of the Structural Change Order and of any consequential orders and directions including those dealing with civic and ceremonial matters. This includes all matters relating to the transition of mayors, sheriffs, chartered trustees and insignia. For the avoidance of doubt:
 - (i) if the majority of county members or any district member votes against any particular proposed submission then, provided a request was made at the meeting when the decision was taken, those members may require their dissent and the reasons for it to be noted on that submission; and
 - (ii) if a majority of county members or district members vote against a submission that is approved by a majority of committee members, the submission will be deemed not to be a joint submission.



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- Oversight of the development of the Constitution and the Schemes of Delegation for the unitary council to be established in Somerset;
- Approval of plans to align existing change activities across the councils;
- Development of the unitary council's annual budget 2023/24 and the associated medium term financial plan;
- Development of policies for the unitary council and protocols across the five councils for use during the transition period to support the implementation of the unitary council and delivery of its annual budget 2023/24.
- Consultation on and an expectation that any comments arising from that consultation with the LGR Joint Committee will be taken into consideration by the councils' executives in respect of the recommendations that they make to their full council on:
 - the budgets to be set by each of the councils for the financial years 2022/23 and any medium-term financial plan to be set by the councils (or any of them); and
 - any policies or plans to be implemented by any of the councils and which will have a material impact on the delivery of the Implementation Plan or the rights and/or obligations of the new unitary council in Somerset on its establishment.

Links between the LGR Joint Committee and other bodies of the Somerset Local Authorities

18. The councils will separately constitute a joint scrutiny committee or panel, the purpose of which will be to scrutinise the work of the LGR Joint Committee.
19. The LGR Joint Committee will receive advice from the LGR Advisory Board but for the avoidance of doubt will not be bound by its recommendations.

Local Government Reorganisation Advisory Board – Terms of Reference

Purpose

The purpose of the Board is to ensure that LGR in Somerset is delivered effectively and with appropriate stakeholder engagement and involvement (including elected Members from all 5 Councils). The Board will:

- Engage with residents, partners, stakeholders and others to promote engagement with and understanding of the new authority as it develops.
- Advise on the design and delivery of the cash and non-cash benefits expected from the new authority.

The Board will have an advisory role only and no decision-making or scrutiny role.

Terms of reference are in development, will be regularly reviewed, and are summarised in this note.

Scope

A work plan will be developed by the Board supported by the Programme Team. However, its first work will be to explore the design, piloting and evaluation of Local Community Networks including establishing between 2 and 4 pilot LCNs by December 2021.

Working groups will be set up on an ad-hoc basis to develop or deliver the work plan. Where practicable, they will be chaired by a member of the Board with recommendations fed back to the Board.

Membership and meetings

Membership is 8 Elected Members (County and District with SCC's Cabinet Member for LGR chairing the meetings), and reps from SALC, health, police, education and voluntary/community sector (Spark Somerset).

The Board will meet in public, monthly, in venues across Somerset. Wherever possible they will be web-cast to allow people to participate remotely.

The first meeting is planned for 30th September 2021, venue to be confirmed.

Meetings are intended to be collaborative and informal with agreement by consensus.

LGR Advisory Board Place in LGR Governance

It is intended that proposals, ideas and recommendations from the Board and working groups will be fed into the implementation executive / joint committee once overall LGR governance is finalised.

Public Space Protection Orders: Yeovil

Executive Portfolio Holder:	Councillor Val Keitch, Strategy and Housing
Ward Member(s)	Councillors Karl Gill, David Gubbins, Andy Soughton
Strategic Director:	Kirsty Larkins, Service Delivery
Service Manager:	Leigh Rampton, Lead Specialist, Communities
Lead Officer:	Paul Huntington, Compliance and Enforcement Specialist
Contact Details:	Paul.huntington@southsomerset.gov.uk or 01935 462532

Purpose of the Report

1. For members to agree to the extension of the Public Space Protection Orders to address street drinking.

Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of 7th October 2021.

Public Interest

3. Public Spaces Protection Orders (PSPO) are intended to deal with a particular nuisance or problem in a specific area that is detrimental to the local community's quality of life, by imposing conditions on the use of that area which apply to everyone. PSPOs are to help ensure that the law-abiding majority can use and enjoy public spaces, safe from anti-social behaviour.
4. This report is requesting an extension to an existing PSPO within Yeovil town centre, which will restrict what people can do and how they behave in public space.

Recommendations

5. It is recommended that:
 - i. That the Council extend the area of the existing Public Space Protection Order to restrict street drinking in the town centre of Yeovil.

Background

6. Local councils are responsible for making Public Spaces Protection Orders. The legal tests focus on the impact that anti-social behaviour is having on victims and communities. The council can make a Public Spaces Protection Order if they are satisfied on reasonable grounds that the activity or behaviour concerned, carried out, or likely to be carried out, in a public space:

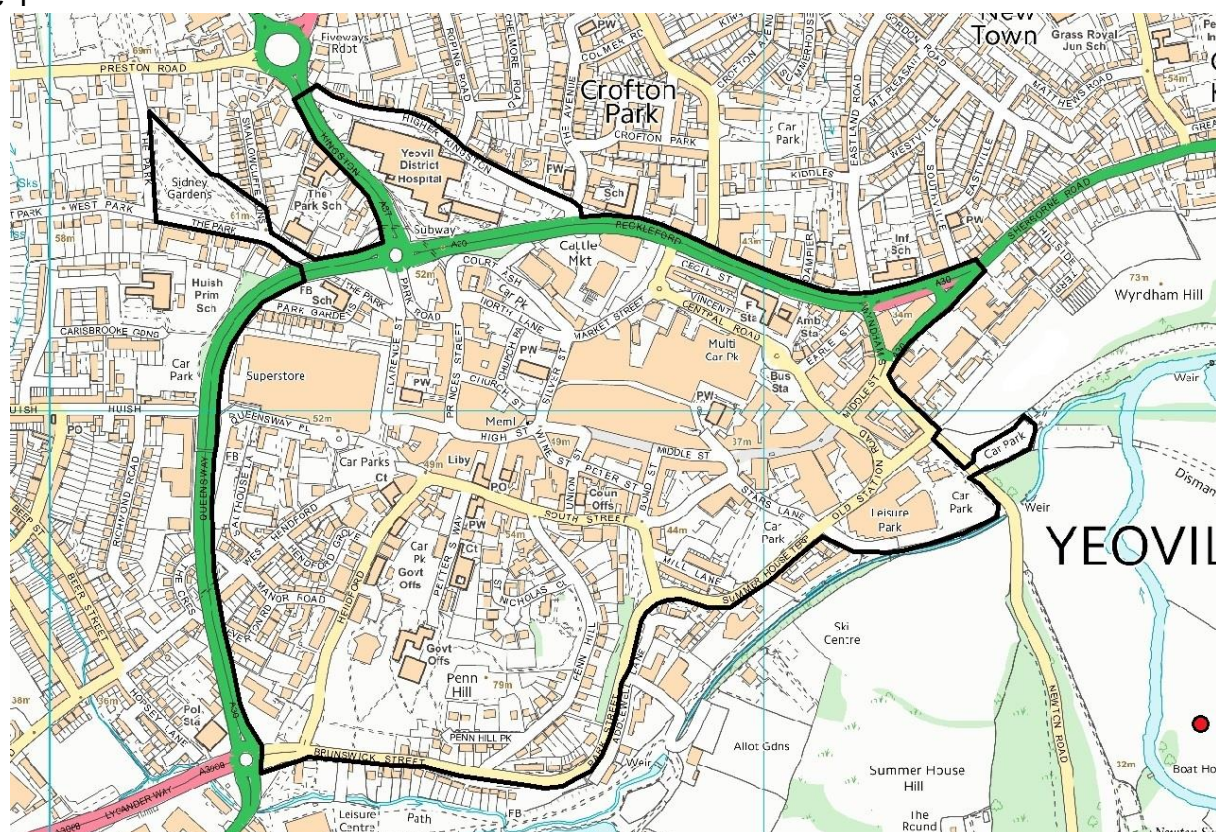
- has had, or is likely to have, a detrimental effect on the quality of life of those in the locality;
- is, or is likely to be, persistent or continuing in nature;
- is, or is likely to be, unreasonable; and
- justifies the restrictions imposed.

7. Before making a Public Spaces Protection Order, the council must consult with the police in considering the extension of the existing PSPO officers have worked closely with the local police in Yeovil to gather the data relating to anti-social incidents.

Street Drinking PSPO

8. On 11th October 2019, a PSPO was made restricting Street Drinking in a defined area of Yeovil Town centre as show in Figure 1. Below

Figure 1

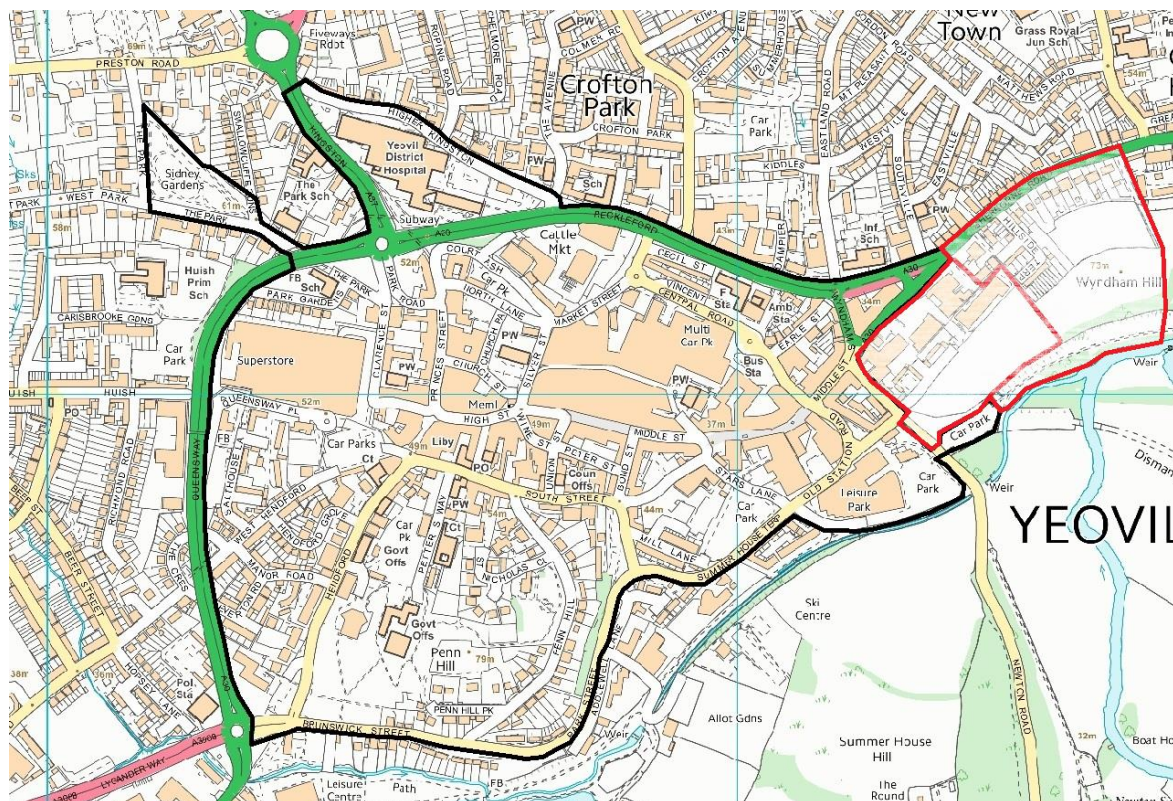


The Requirements

- No person shall fail to stop consuming alcohol when required to do so by a Police Officer, Police Community Support Officer or an authorised officer from the Council.

- No person shall fail to surrender anything in his or her possession, which a Police Officer, Police Community Support Officer or authorised officer from the Council reasonably believes to be alcohol or a container for alcohol when required to do so.
9. Enforcement activities within the defined area have taken place since the PSPO was put in place. This involved publicising the PSPO, engaging with members of the public, patrols and active enforcement taken in partnership with Avon and Somerset Police.
 10. The existence and enforcement of the PSPO has had some positive impact on behaviour within the defined PSPO area. However, this has had the unintentional impact of displacing some of the unwanted anti-social behaviour outside the defined area.
 11. The evidence gathered has identified 72 alcohol related incidents in between January and July (inclusive) 2021 and this behaviour is concentrated in the Wyndham Hill area of the Country Park, Newton Road, Ivel Court and along Sherborne Road. This behaviour is causing problems for business and residents in this area.
 12. It is proposed that the PSPO is extended beyond the original boundaries of the first order. Figure 2 shows the proposed extension to the restricted area

Figure 2: Proposed Extension to the Restricted Area



13. The PSPO is not the only tool available to the Council and Police force in dealing with anti-social behavior associated with alcohol. SSDC Licensing department has worked and will continue to work with police officers to attempt to restrict the availability of alcohol to known offenders. Should specific individuals come to the attention of the partner organizations the additional enforcement options exist such as Community Protection Notices and Civil Injunctions.
14. SSDC and the Police will be keeping the issue of alcohol related ASB under review. It is hoped that if preventative measures and support can be provided to problem groups, together with a firm enforcement stance, then incidents within Yeovil will generally reduce.
15. A total prohibition on the consumption of alcohol was considered within the original restricted area. However looking at the experience of other councils and in consultation with the police, it was decided the proposed restrictions below are more appropriate. Not only do these restrictions link the behavior directly to anti-social impacts, but it gives the person subject to the restrictions an opportunity to comply with the restrictions, without the need for further formal enforcement action. This complies with the principles of proportionality, directly addresses the behavior causing the problem and is reasonable. The requirements are shown below:

The Requirements

- No person shall fail to stop consuming alcohol when required to do so by a Police Officer, Police Community Support Officer or an authorised officer from the Council.
- No person shall fail to surrender anything in his or her possession, which a Police Officer, Police Community Support Officer or authorised officer from the Council reasonably believes to be alcohol or a container for alcohol when required to do so.

Financial Implications

Signage

As a result of imposing a PSPO there is a statutory requirement to publicise the PSPO and designate the restricted area. Signage will therefore be required. It is estimated that to achieve this 30 signs will be required for the Yeovil PSPOs at the following costs

6 x PSPO signage	£180.00
Installation cost x 6	£100.00

These installation costs are not significant and will be met from existing budgets.

Enforcement Costs

Enforcement of the PSPOs will be incorporated into the existing role of the Compliance and Enforcement officer. Initially it is expected that the direct enforcement and evidence gathering will be undertaken by the Police in accordance with the proposed enforcement protocol.

Risk Matrix

The risk matrix shows risk relating to the Corporate Plan headings.

Reputation

In the consultation public survey, 85% of respondents felt that anti-social behaviour affected how much they enjoyed their visits to Yeovil. 75% of respondents also felt that anti-social behaviour was not well dealt with in Yeovil. Since South Somerset District Council and only SSDC has the power to designate PSPOs, if the Council fails to do so after a clear need has been established, the Councils' reputation could be impacted.

Corporate Plan Priorities

South Somerset District Council plans to regenerate the town centre of Yeovil through multiple projects as part of the adopted Yeovil Refresh strategy. The stated vision is that "Yeovil town centre will be a vibrant place to live, work, learn and visit. Revitalised public spaces will celebrate the town's civic life and heritage – and help to regenerate the town's retail heart. A broad range of quality housing will encourage a diverse and inclusive community."

Should anti-social behaviour be allowed to continue unchallenged within the town centre this will undermine the efforts to achieve the stated vision.

Community Priorities

In the Council Plan themes and Areas of focus for 2019/20 under the banner of Healthy, Self-reliant Communities SSDC have stated that we will "Work with partners to keep our residents safe and help them to feel safe in their local area."

The PSPOs will give both our officers and the local police another tool to help tackle anti-social behaviour within Yeovil Town centre.

Capacity

The short term impacts on capacity are likely to be low. The on street enforcement is to be undertaken by the police, who will supply SSDC with the evidence should the PSPOs be breached. Such evidence will be followed up by the Compliance and Enforcement specialist as part of his normal duties.



South Somerset District Council

In the longer term, effective enforcement will improve the rates of compliance and thus reduce service demand for both the Council and the Police.

Financial

The direct financial risk is limited to the cost of signage. No other risk has been identified.

Risk Profile before officer recommendations

		CpP,CP	R	
F	CY			

Risk Profile after officer recommendations

		CpP	R	
F	CY, CP			

Key

Categories	Colours (for further detail please refer to Risk management strategy)
R - Reputation	High impact and high probability
CpP - Corporate Plan Priorities	Major impact and major probability
CP - Community Priorities	Moderate impact and moderate probability
CY - Capacity	Minor impact and minor probability
F - Financial	Insignificant impact and insignificant probability

Council Plan Implications

This measure links in with the theme of promoting Healthy, Self-reliant Communities. It involves working closely with our partners, in this case the police, social services and housing providers to keep our residents safe and help them to feel safe in their local area.

Carbon Emissions and Climate Change Implications

There are no carbon emission or climate change implications with regard to this recommendation.

Equality and Diversity Implications



South Somerset District Council

It is important for councils to consider carefully the potential impact of a PSPO on different sections of their communities. In introducing an Order, councils must take care to ensure that they comply with the requirements of the public sector equality duty under the Equality Act 2010. The Equality Act requires public authorities to have due regard to a number of equality considerations when exercising their functions. Proposals for a PSPO should therefore be reviewed to determine how they might target or impact on certain groups.

Although it is not a specific requirement of the legislation, it is recommended that areas undertake an Equality Impact Assessment (EIA) to assess whether the proposed PSPO will have disparate impact on groups with protected characteristics.

The full equality impact assessment is included within the background documents. It shows that there is a potential negative impact to those with disabilities, specifically mental health issues. The EIA details how this potential negative impact is to be mitigated against.

Data Protection Impact Assessment

Because personal and sensitive data can potentially be passed to SSDC as part of the enforcement process of the PSPOs a full data protection impact assessment is required and had been completed. This is included in the background papers.

Background Papers

- Consultation Response
- Draft Enforcement Protocol between Avon and Somerset Police and South Somerset District Council
- Equalities Impact Assessment
- Data Protection Impact Assessment
- Street Drinking Public Space Protection Order: Yeovil



District Executive Forward Plan

Executive Portfolio Holder: Val Keitch, Leader, Strategy and Housing
Strategic Director: Nicola Hix, Strategy and Support Services
Lead Officer: Angela Cox, Democratic Services Specialist
Contact Details: angela.cox@southsomerset.gov.uk or (01935) 462148

Purpose of the Report

1. This report informs Members of the current Executive Forward Plan, provides information on Portfolio Holder decisions and on consultation documents received by the Council that have been logged on the consultation database.

Public Interest

2. The District Executive Forward Plan lists the reports due to be discussed and decisions due to be made by the Committee within the next few months. The Consultation Database is a list of topics which the Council's view is currently being consulted upon by various outside organisations.

Recommendations

3. That District Executive recommend that the Chief Executive agree to:
 - a) approve the updated Executive Forward Plan for publication as attached at Appendix A
 - b) note the contents of the Consultation Database as shown at Appendix B.

Executive Forward Plan

4. The latest Forward Plan is attached at Appendix A. The timings given for reports to come forward are indicative only, and occasionally may be re scheduled and new items added as new circumstances arise.

Consultation Database

5. The Council has agreed a protocol for processing consultation documents received by the Council. This requires consultation documents received to be logged and the current consultation documents are attached at Appendix B.

Background Papers

6. None.

SSDC Executive Forward Plan – Appendix A

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
November 2021	Review of SSDC Commercial Strategy	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Robert Orrett, Commercial Property. Land & Development Manager	District Executive
November 2021	Capital & Revenue Budget monitoring reports for Quarter 2	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Karen Watling, Interim Section 151 Officer	District Executive
November 2021	Quarterly Corporate Performance Report	Portfolio Holder - Strategy & Housing	Director (Support Services & Strategy)	Cath Temple, Specialist (Performance)	District Executive
November 2021	Yeovil Refresh - Implementation (Confidential)	Portfolio Holder - Economic Development including Commercial Strategy	Director Place and Recovery	Robert Orrett, Commercial Property. Land & Development Manager	District Executive
November 2021	Briefing on Local Government Reorganisation in Somerset (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive
December 2021	SSDC Taxi Policy	Portfolio Holder - Protecting Core Services	Director Service Delivery	Vicki Dawson, Lead Specialist (Environmental Health)	District Executive
December 2021	Investment Assets update report	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Robert Orrett, Commercial Property. Land & Development Manager	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
December 2021	Draft Medium Term Financial Plan	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Karen Watling, Interim Section 151 Officer	District Executive
December 2021					South Somerset District Council
December 2021	Briefing on Local Government Reorganisation in Somerset (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive
January 2022	Somerset Waste Partnership Annual Report and Draft Business Plan	Portfolio Holder - Environment	Director Service Delivery	Mickey Green, Managing Director, Somerset Waste Partnership	District Executive
January 2022	Planning Re-imagined Update	Portfolio Holder - Protecting Core Services	Director Service Delivery	Kirsty Larkins, Director (Service Delivery)	District Executive
January 2022	Council Tax Support Scheme 2022/23	Portfolio Holder - Protecting Core Services	Director Service Delivery	Tamsin Gold, Benefits Team Leader	District Executive
January 2022					South Somerset District Council
January 2022	Briefing on Local Government Reorganisation in Somerset (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
February 2022	2022/23 Revenue and Capital Budget	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Karen Watling, Interim Section 151 Officer	District Executive
February 2022					South Somerset District Council
February 2022	Council Plan 2022/23	Portfolio Holder - Strategy & Housing	Director (Support Services & Strategy)	Nicola Hix, Director (Support Services & Strategy)	District Executive
February 2022					South Somerset District Council
February 2022	Capital & Revenue Budget monitoring reports for Quarter 3	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Karen Watling, Interim Section 151 Officer	District Executive
February 2022	Briefing on Local Government Reorganisation in Somerset (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive
TBC	Update on the delivery of the Economic Development Strategy and funding delivery	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Robert Orrett, Commercial Property, Land & Development Manager	District Executive
TBC	Review of the Local Plan	Portfolio Holder - Strategy & Housing	Director (Support Services & Strategy)	Jo Wilkins, Specialist (Strategic Planning)	District Executive

APPENDIX B - Current Consultations – October 2021

Purpose of Document	Portfolio	Director	Response to be agreed by	Contact	Deadline for response
<p>Business rates revaluation 2023: the central rating list</p> <p>This consultation seeks views on changes to the central rating list for the 2023 business rates revaluation. It covers the following areas:</p> <ul style="list-style-type: none"> • the current principles of the central rating list • hereditaments suitable for moving to the central rating list for the 2023 revaluation • interaction with the Business Rates Retention Scheme • next steps <p>The scope of this consultation is limited to the contents of the central rating list for the 2023 rating list. The consultation does not extend to the assessment of the rateable value of hereditaments (which is done by the Valuation Office Agency independently of Ministers) or any matters falling within the ongoing Treasury Fundamental Review of Business Rates (such as the rateability of plant and machinery and reliefs).</p> <p>Business rates revaluation 2023: the central rating list - GOV.UK (www.gov.uk)</p>	<p>Finance and Legal Services</p>	<p>Nicola Hix, Strategy and Support Services</p>	<p>Officers in consultation with Portfolio Holder</p>	<p>Karen Case and Alison Hann</p>	<p>13 November 2021</p>



Date of Next Meeting

Members are asked to note that the next meeting of the District Executive will take place on **Thursday, 4th November 2021** as a virtual consultation meeting via Zoom meeting software commencing at 9.30 a.m.



Exclusion of Press and Public

The District Executive is asked to agree that the following item (agenda item 15) be considered in Closed Session by virtue of the Local Government Act 1972, Schedule 12A under paragraph 3:

“Information relating to the financial or business affairs of any particular person (including the authority holding that information).”

It is considered that the public interest in maintaining the exemption from the Access to Information Rules outweighs the public interest in disclosing the information.



Briefing on Local Government Reorganisation

Executive Portfolio Holder: Val Keitch, Strategy and Housing
Chief Executive: Jane Portman
Strategic Director: Jan Gamon, Place and Recovery
Lead Officer: Jan Gamon, Director – Place and Recovery
Contact Details: Jan.gamon@southsomerset.gov.uk or 01935 462095

The Chief Executive and Director for Place and Recovery will provide Members with a verbal update on any matters relating to the future of Local Government in Somerset.