



---

## **District Executive (Informal)**

**Thursday 10th February 2022**

**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](mailto:democracy@southsomerset.gov.uk) by 9.00am on Wednesday 9<sup>th</sup> February 2022.

The meeting will be viewable online at:

[https://www.youtube.com/channel/UCSDst3IHGj9WoGnwJGF\\_soA](https://www.youtube.com/channel/UCSDst3IHGj9WoGnwJGF_soA)

For further information on the items to be discussed, please contact [democracy@southsomerset.gov.uk](mailto:democracy@southsomerset.gov.uk)

This Agenda was issued on Wednesday 02 February 2022.

**Jane Portman,**  
Chief Executive

**This information is also available on our website  
[www.southsomerset.gov.uk](http://www.southsomerset.gov.uk) and via the Modern.gov app**

## Information for the Public

In light of the coronavirus pandemic (COVID-19), District Executive Committee 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, and at the Council meeting of 16 December 2021, a further extension to 8 July 2022 was agreed.

For full details and to view the reports please see -

<https://modgov.southsomerset.gov.uk/ieListMeetings.aspx?CId=137&Year=0>

## 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.

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 modern.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](mailto: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](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](mailto:democracy@southsomerset.gov.uk) by 9.00am on Wednesday 9<sup>th</sup> February 2022. 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 10 February 2022**

## Agenda

### 1. Minutes of Previous Meeting

To approve as a correct record the minutes of the District Executive meeting held on 6<sup>th</sup> January 2022.

### 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. Somerset Waste Partnership Annual Report and Business Plan Update (Pages 6 - 29)

### 7. Adoption of the Future Chard Strategy (Pages 30 - 132)

### 8. Council Tax Policies (Pages 133 - 155)

### 9. Business Rate Reliefs (Pages 156 - 229)

### 10. Corporate Performance Report 2021-22: 3rd Quarter (Pages 230 - 257)

### 11. 2021/22 Revenue Budget Monitoring Report for the Period Ending 30 December 2021 (Pages 258 - 269)

### 12. 2021/22 Capital Budget Monitoring Report for the Period Ending 30 December 2021 (Pages 270 - 286)

**13. District Executive Forward Plan** (Pages 287 - 293)

**14. Date of Next Meeting** (Page 294)

**15. Exclusion of Press and Public** (Page 295)

**16. Briefing on Local Government Reorganisation (Confidential)** (Page 296)

## Somerset Waste Partnership Annual Action Plan & Business Case

Executive Portfolio Holder:	Sarah Dyke, Portfolio Holder for Environment
Strategic Director:	Nicola Hix, Director (Strategy & Support Services)
Service Manager:	James Divall, Assistant Director (Strategy & Support Services)
Lead Officer:	Mickey Green, Managing Director, Somerset Waste Partnership <a href="mailto:Mickey.Green@somersetwaste.gov.uk">Mickey.Green@somersetwaste.gov.uk</a>
Contact Details:	<a href="mailto:James.divall@southsomerset.gov.uk">James.divall@southsomerset.gov.uk</a> or 01935 462261

## Purpose of the Report

1. The purpose of this report is to approve the draft Business Plan 2022-2027 and draft budget 2022-2023 for the Somerset Waste Partnership (SWP).
2. To update the Executive on progress on the rollout of Recycle More across the county.

## Forward Plan

3. This annual report appeared on the District Executive Forward Plan with an original anticipated Committee date of January 2022, but this report was delayed until February 2022.

## Public Interest

4. The report explains the priorities for Somerset Waste Partnership (SWP) over the next five years with a particular emphasis on activities in the next year. The partnership manages waste collection and disposal across Somerset and is accountable to the Somerset Waste Board. Approval of the Business Plan and budget is a constitutional requirement of the Board.

## Recommendations

5. That District Executive recommend that the Chief Executive:-
  - a) Approve the Somerset Waste Partnership's (SWP) Draft Business Plan 2022-2027 and draft Budget 2022-23 (see Appendix A);
  - b) Recommend to Full Council at its meeting on 28th February 2022 to approve an increase to the 2022-23 revenue budget of £235,120 that will arise from approving the Business Plan;
  - c) Note the progress of the continued implementation of Recycle More across the county.

## Background



6. SWP manages waste and recycling services on behalf of all local authorities in Somerset. The partnership is governed through a Joint Committee known as the Somerset Waste Board. It is required to prepare a draft Business Plan and budget with an accompanying Action Plan on an annual basis. The Board then approves a draft for consultation with the partners, so that each partner authority has the opportunity to comment on the plan.
7. The Board, can, by majority vote, amend the Business Plan in order to accommodate any unforeseen circumstances and to assist the Board to achieve the Aims and Objectives. Any partner council can request as an amendment at any time.
8. The Board's business planning cycle requires a draft report to be approved by the Board in December and circulated to partners for comment prior to the adoption of the Board's Annual Budget the following February. The Draft Business Plan was approved for consultation by the Board at their meeting on 10<sup>th</sup> December 2021, and the final Business Plan will be considered by the Board on 11<sup>th</sup> February 2022. Once approved or noted by all partners, the plan and the budget will be formally adopted by the Board to provide a framework within which the Board can make decisions and steer the delivery of Waste Partnership services.

### **Current Position – Draft SWP Business Plan 2022 - 2027**

9. With the creation of a new Unitary Authority in 2023, this may be the last year of a SWP Business Plan in this format. The activity required to smoothly transition to a new Unitary Authority is reflected at a high level in the business plan, but as this actively revolves, it may affect other activities within the plan.
10. The budget for 2022-23 will see a significant increase of 10%. This is due to several factors including the current high rates of inflation.
11. The Recycle More scheme was rolled out to South Somerset at the end of June 2021. The launch and initial embedding of Recycle More in South Somerset was significantly hampered by the nationwide driver shortage, a situation that has been exacerbated by pandemic delays to driver training, Somerset's challenging labour market and the strain on crews who have been coping with increased tonnages for a sustained period.
12. These pressures saw poor collection performance in the early stages of the rollout and in the delivery of Bright Blue Bags ahead of service launch, but the situation has improved as intense work by SUEZ saw staffing numbers and services get back on track.
13. In the autumn operational changes at the Lufton depot (recycling and garden waste collections now running from the site as well as refuse) had affected collection reliability in some localised areas last month. Additional staff and management support is now in place to address these issues, with the early signs of improvement being encouraging. A presentation to District Executive will update on service stability and the significantly increased recycling tonnages achieved through the Recycle More rollout in South Somerset.
14. SWP have carefully reviewed their Business Continuity arrangements to ensure they can



## South Somerset

### District Council

keep moving forward with the Recycle More programme, but they continue to operate in a high-risk environment particularly due to the impact of Covid and the national driver shortage.

15. SWP remain focussed on three outcomes as last year, and under each of these outcomes sit linked activities structured into themes. The plan this year has reflected on the service disruptions in 2020/21, the ongoing impacts of national driver shortage, the continuing pandemic and the pressure this has put on staff from SWP, SUEZ and partners. Delivering a stable service and rebuilding trust with the public is critical to next year's activity.

16. Key areas of activity for next year are:

	<b>Area of activity</b>	<b>Content</b>
1	Waste reduction	Focusing on food waste and plastic, signposting to zero waste shops, reusable nappies
2	Promoting Reuse	Implementing the reuse strategy agreed by the Board in September 2021
3	Recycling	Bedding in the recycle More roll-out, ensuring homes are built with recycling in mind, food waste in communal properties, tackling hard to treat waste streams (e.g., soft plastics), HWRCs, composition and participation analysis, recycling A-Z guide, targeted campaigns
4	Decarbonising residual waste	Heat offtake, carbon capture and storage, education
5	Decarbonising our operations	Electric supervisors' vans, green depot infrastructure, pilot alternative fuels, drive down carbon intensity of day-to-day operations, partial re-fleet of refuse vehicles
6	Tackling non-household waste	Schools, public sector estate, business waste
7	Working with others	Parish Councils, local data and engagement, developing partnerships, community action groups, engagement with front-line staff
8	Improving the customer experience	In-cab technology, innovation, website, improving complaints management, GDPR, assisted collection review, processes around new home occupation, enforcement, supporting the most vulnerable
9	Supporting wider goals in Somerset	Tackling waste on the go, tackling fly-tipping, supporting local businesses and those far from the labour market
10	Enabling activities	Depot infrastructure, health and safety, contract management, service reviews, influencing national policy, long term strategy, behavioural insights, business continuity planning, preparing for Unitary

17. The business plan attached in Appendix A, details the action plans in place for the next 5 years and the roll out of recycle more. The financial details have been discussed with all Section 151 officers and they are based on robust assumptions and timescales.





## South Somerset District Council

18. The savings figure included for SSDC of £169,573, which is included in the draft business plan in 2022-23, reflects the savings to all partner authorities once Recycle More breakdown point is achieved. Breakeven point continues to be reviewed by SWP, partner offices and the Board. However, it should be noted that there is an increase in cost of £505,219 after taking this saving into account.
19. The figures provided for Covid and savings have to be caveated that depending on what happens with the Covid 19 pandemic there could be a further delay with the timescales for the roll out of Recycle More, which in turn could effect on the timing of the savings built into the budget figures. The inflation figure for the County Council will increase significantly as the contract inflation figure is finalised in March – this is reflected in Somerset County Council's budget and is highlighted for information only as it has no impact on SSDC's costs.

### Financial Implications

20. The budget increase has been added to the 2022-23 waste and recycling revenue budget, the revenue budget is recommended for approval by SSDC Full Council at the end of February 2022.
21. An element of the budget increase will be funded by a proposed transfer from an earmarked reserve, which was created to fund additional pressures on the waste and recycling budget.
22. It should be noted that the increase to the 2022-23 revenue budget of £235,120 differs from the increase included in the draft business plan. This is partially due to the proposed transfer from the earmarked reserve to fund an element of the increase and the 2021-22 base budget figures for SWP and SSDC being different.
23. The SWP constitution requires the annual draft business plan to be shared with the Council for comments prior to the adoption of the final business plan by the Somerset Waste Board. The report therefore provides the opportunity for members to comment on the draft business plan.

### Legal implications (if any) and details of Statutory Powers

24. No legal implications.

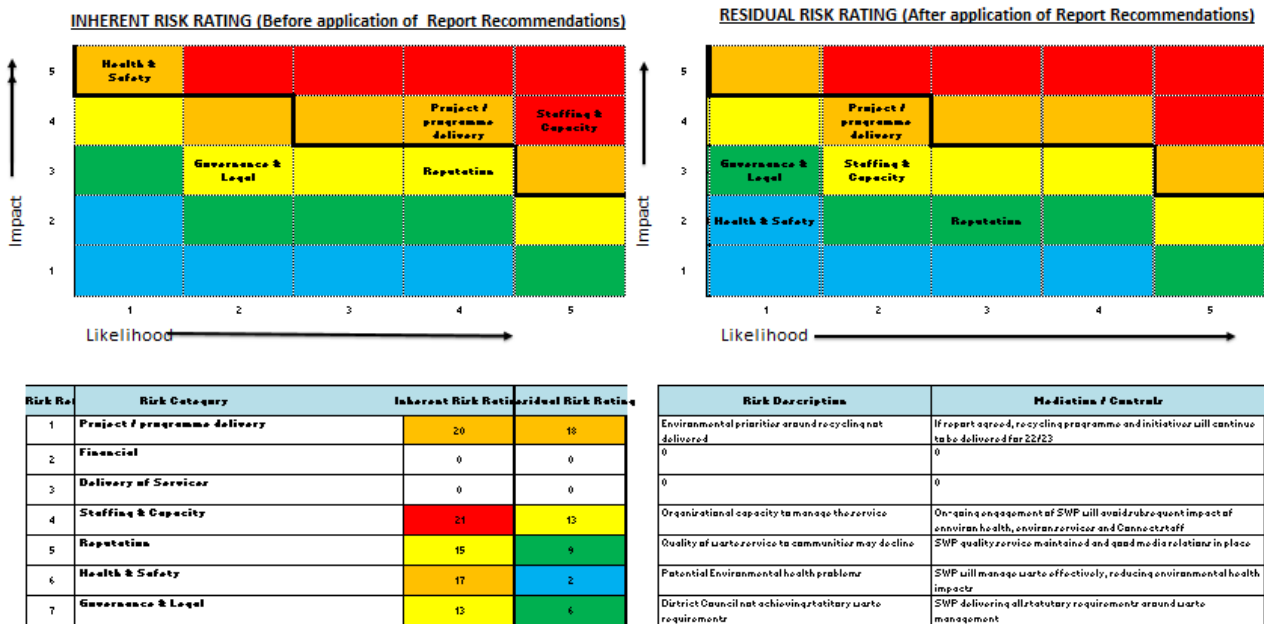
### Risk Matrix

25. Failure to approve a Business Plan (a constitutional requirement) will affect the ability of the Somerset Waste Partnership to effectively deliver the board's vision and hence its contribution to SSDC's priorities. As set out in the Business Plan (appendix A) section entitled 'Key Challenges and Opportunities' there are considerable risks at the moment for SWP – including those inherent to the waste sector and those resulting from the impact of Covid-19 and the National Driver Shortage. Cumulatively these mean that cost remain volatile and the pressure on staff remains high.



# South Somerset District Council

26. South Somerset District Council have completed an internal risk assessment for this report against the council's risk register. The results of this assessment can be seen in the table below:



## Council Plan Implications

27. The business plan plays a central point in working towards the Councils' aim to keep South Somerset clean, green and attractive and respond to the climate emergency and working in partnership to:

- Promote recycling and minimise waste

28. Waste and recycling collections are two of the highest profile and most expensive services funded by the Council, and these services are always ranked by the public as two of the most important and highly value services.

## Carbon Emissions and Climate Change Implications

29. Somerset Waste Partnership is one of the Council's Key Partnerships and delivers client and operational responsibilities for delivery of recycling and waste reduction priorities. This item links to the Council's Environment Priority and the Climate Change agenda.

## Equality and Diversity Implications

30. Many of the actions in the business plan relate to the implementation of decisions already taken by the Somerset Waste Board and Equalities Impact Assessments were undertaken at the time.

31. EIA's will be carried out as appropriate as future review and actions arise. SSDC have also completed a Equalities Relevance Assessment for this report too (Appendix B).



## **South Somerset District Council**

32. The decision to carry out an EIA in most cases will be delegated to the SWP's Managing Director, or if significant, then they will be returned to the Somerset Waste Board prior to commencing development.

### **Privacy Impact Assessment**

33. Personal Data held by the SWP is fundamentally the same as currently managed and used. As technology is developed and used to assess customer behaviour to reduce waste and improve recycling, then impact assessments will need to be carried out by the SWP to ensure compliance with data protection regulations.

### **Background Papers**

- SWP Annual Report and Draft Business Plan – District Executive 20<sup>th</sup> Jan 2020
- SWP Business Plan 2019 - 2024
- SWP Business Plan 2021 – 2026



# **SWP Business Plan 2022 – 2027**

<b>Table of Contents</b>	
Page 3	About Somerset Waste Partnership
Page 4	Key Challenges and Opportunities
Page 5	Approach to Business Plan
Page 6	Action Table
Page 15	Draft Budget Table 2022/23

## About Somerset Waste Partnership

### Our vision and values

<b>Who we are:</b>	Somerset's Local Authorities working together as the Somerset Waste Partnership, ensuring that our household waste is reduced, collected, reused, recycled and effectively treated.
<b>What we do:</b>	<ul style="list-style-type: none"> <li>• Preserve our environment by making every effort to ensure our household waste is not wasted but reused as a valuable resource.</li> <li>• Deliver excellent customer service and value for money to create a more sustainable Somerset.</li> </ul>
<b>What we want to become:</b>	An exemplar for how we manage waste as a resource, work with others and support our residents to manage their household waste and make our service the best it can be.
<b>Our values:</b>	<ul style="list-style-type: none"> <li>• <b>Insight:</b> Working with our partners to understand how and why people behave as they do and use this knowledge to shape our service.</li> <li>• <b>Collaboration:</b> Treating everyone we work with as an equal, knowing we have greater success when we work together.</li> <li>• <b>Innovation:</b> Learning from others and constantly looking at new ways of working to give the best service we can.</li> <li>• <b>Quality:</b> Focusing on excellent customer service and making the best use of the waste we collect.</li> </ul>

### Background to SWP

Somerset Waste Partnership (SWP) was established in 2007 and manages waste services on behalf of Mendip, Sedgemoor, Somerset West and Taunton, South Somerset District Councils, and Somerset County Council. This made it the first county-wide waste partnership in the country. It has a history of innovation – the first to roll out food waste at scale, the first to publish an annual report showing exactly what happens to all its recycling and is known for its commitment to collecting quality source separated recycling materials which are used as resources by UK industry.

SWP is accountable to the Somerset Waste Board (SWB), which consists of two members from each of the partner authorities. For further information about Somerset Waste Partnership and the Somerset Waste Board visit [www.somersetwaste.gov.uk](http://www.somersetwaste.gov.uk).

SWP has delegated authority to deliver household waste and recycling services throughout Somerset, including management of kerbside collections, recycling sites and disposal sites. SWP contracts out these services to SUEZ, Viridor and Biffa.

National Government has announced that the five existing councils in Somerset will be replaced by a new single unitary authority in 2023. This Business Plan highlights the work necessary to enable SWP to play its role in this transition.

## Key Challenges and Opportunities

Political	<p><b>The impact of withdrawal from the EU:</b> Brexit is recognised nationally as one of the causes of the national driver shortage and wider supply chain issues. Whilst we cannot foresee any further direct impacts (especially with 98% of our recycling staying in the UK) there may be further indirect impacts.</p>
	<p><b>National legislative change:</b> Further national consultations were undertaken in Spring 2021 on Deposit Return Schemes, Extended Producer Responsibility and collection consistency. SWP are awaiting clarity on government’s next steps following these consultations, but they are likely to have profound implications.</p>
	<p><b>Future of Local Government in Somerset:</b> A Unitary council for Somerset will be formed in 2023, with a shadow authority ahead of that. Whilst SWP already operates county-wide, there will be a significant amount of work involved to aligning to a new structure (for example customer service arrangements) that could potentially impact/delay other projects. Equally, SWP is keen to understand and explore the opportunities for improvement that will come with the new structures and ways of working.</p>
Economic	<p><b>Financial pressure on partner authorities/contract pressures:</b> The financial environment in which we operate is tightly constrained, especially given the impact of Covid-19 on local government finance. National legislative change may significantly impact on SWP’s finances and may require contract renegotiation.</p>
	<p><b>National Driver shortage:</b> The national challenges are unlikely to go away overnight and there is a real risk of pay inflation and future shortages.</p>
	<p><b>Recyclate risk:</b> SWP share risk with its collection contractor on recyclate value. This will impact upon the SW:EEP fund and hence funding for behavioural change</p>
	<p><b>Risk of recession:</b> The economic outlook remains uncertain. Recessions typically see lower levels of consumption and hence waste; however, the past may not be a reliable guide to the future, given the uncertain impact of Covid-19.</p>
Social	<p><b>Demographic changes:</b> Somerset’s growing, and ageing population informs our planning for the future. Somerset has historically benefited from near full employment, which makes recruitment more challenging.</p>
	<p><b>Covid-19:</b> The ongoing risks are reflected in our day-to-day operations, but we are not yet clear which changes will be permanent and what will revert back more to pre-pandemic conditions e.g. how much home working will remain the norm and what will this do to waste generated at home.</p>
Technological	<p><b>Social media:</b> Increasing use of social media and emerging platforms present an opportunity to reach more people but raises public expectations.</p>
	<p><b>Big data:</b> The ability to manipulate large data sets (be it around people’s behaviour or the life cycle of resources and waste) can be powerful, but SWP has work to do in order to make best use of data to drive its actions and accountability.</p>
	<p><b>New materials/processes:</b> New materials may emerge onto the market quicker than our ability to manage them at the end of their life, and on the positive side new processes may make previously hard to recycle materials possible to target.</p>
Environmental	<p><b>Somerset’s Climate Emergency:</b> This remains at the heart of what SWP is here to do and what motivates all our staff. However, our ability to implement change will be constrained by resources.</p>
	<p><b>Public Awareness:</b> Many people are much more aware of climate change, keen to do more, and frustrated if they feel they cannot do more. We need to continue to do all we can to ensure people understand the contribution that reduction, reuse and recycling make to tackling climate change, and know what happens to their recycling.</p>

## Approach to Business Plan

As per the requirement in the constitution, our Business Plan explains how we will work towards our Vision over the next five years, with a particular focus on next year. With the creation of a new Unitary Authority in 2023 this may be the last year of a SWP Business Plan in this format. The activity required to smoothly transition to a unitary authority is reflected in the Business Plan, but as this activity evolves it may impact on the delivery of other activities within the Business Plan.

SWP remain focussed on three outcomes as last year, beneath which sit a range of inter-linked activities structured into themes. This year's plan is an evolution rather than a revolution but aims to reflect the impact of service disruption in 2020/21, the ongoing impacts of a national driver shortage, the ongoing pandemic and the pressure this has created on SWP, SUEZ and partner staff. After such a disrupted year with such significant change (the biggest change to kerbside recycling in more than a decade, the immediate priorities are around consolidating progress and doing the core functions well. Delivering stable services and rebuilding trust with the public is critical to next year's activity.

<i>Theme</i>		<b>Delivering excellent services</b>	<b>Changing behaviours</b>	<b>Tackling climate change</b>
		<i>SWP effectively collects, recycles and treats waste</i>	<i>People manage waste as a resource</i>	<i>SWP maximises its contribution to tackling the climate emergency</i>
<b>1.</b>	<b>Waste reduction</b>			
<b>2.</b>	<b>Promoting Reuse</b>			
<b>3.</b>	<b>Increasing Recycling</b>			
<b>4.</b>	<b>Decarbonising residual waste</b>			
<b>5</b>	<b>Decarbonising our operations</b>			
<b>6.</b>	<b>Tackling non-household waste</b>			
<b>7.</b>	<b>Working with others</b>			
<b>8.</b>	<b>Improving the customer experience</b>			
<b>9.</b>	<b>Supporting wider goals in Somerset</b>			
<b>10.</b>	<b>Enabling activities (inc . transition to Unitary)</b>			

SWP propose to continue with the two charities we first adopted in 2019 to support through staff fundraising and volunteering:

<b>Local Charity</b>	<b>National Charity</b>
<b>RAFT</b> (Refugee Aid from Taunton)	<b>WasteAid</b>
RAFT provide aid through donations to help refugees and displaced people wherever and whenever they are able, regardless of colour, culture and religion. It demonstrates an innovative approach to reuse.	70% of the plastic in the oceans comes from places with no waste management. WasteAid helps people turn their waste into useful products, sharing recycling skills to create green jobs, improve public health and protect the environment.



<b>1. Waste Reduction</b>			
In accordance with the waste hierarchy, reducing the amount of waste we generate in the first place is the best environmental (and financial) outcome			
<b>What</b>		<b>When</b>	<b>Why</b>
<b>1.1</b>	<b>Food waste reduction</b>	Ongoing	Composition analysis shows us that c70% of food waste was avoidable and it is one of the most carbon intensive items in our waste. As set out in the climate emergency strategy, in the medium term we will seek to work with partners to develop food waste strategy for Somerset (to avoid food becoming waste in the first place), including prioritising a food waste reduction campaign across Somerset. Presence at relevant events will focus on food waste reduction.
<b>1.2</b>	<b>Refill campaign</b>	Ongoing	SWP coordinates the Refill campaign in Somerset, encouraging reusable alternatives to single use water bottles. SWP will use existing channel to raise profile of any Refill.org.uk initiatives and work with partners to promote related schemes (e.g. SWT Wessex Water drinking station).
<b>1.3</b>	<b>Signpost to zero waste shops</b>	2022/23	Building on SWP's crowd-sourced listing of zero/minimal waste shops across Somerset will complete development of an online map that helps identify these shops, linking in with the recycling A-Z. Promotion of this tool will make it easier for people to do the right thing.
<b>1.4</b>	<b>Reusable nappies</b>	Ongoing	Continue to provide support to local cloth (reusable) nappy library groups to enable them to provide support and nappy loan kits to more families. Whilst we recognise reusable nappies will not be a solution for all, we want it to be easier for those considering their use to make it work for them. Approach and actions to be shaped by feedback from parents after what has been a very disrupted year.
<b>1.5</b>	<b>Waste prevention campaigns</b>	Ongoing	Seasonal campaign ahead of the 2022 festive season seeking to reduce cardboard 'consumption' - potentially an expanded 'think outside the box' campaign for Christmas 2022 to promote local businesses that are exemplars for sustainability Seek funding opportunities to enable other campaigns (SWP resources will primarily be focussed on reuse and recycling) and review the pledge against preventable plastic.
<b>1.6</b>	<b>Engaging with young people</b>	Ongoing	Our Schools Against Waste programme highlights waste reduction, as does the newly launched Eco Schools grant funding. SWP will seek to engage with further with Youth Parliament and other relevant communities and understand best ways to engage young people.
<b>How will we measure success?</b>		SWP reports quarterly to the board on waste minimisation (total household arisings) as well as updating on specific projects through the Board performance report. The impact of Covid on behaviours does make comparisons challenging. Waste composition analysis will help us understand what Somerset residents are throwing away.	

<b>2. Promoting reuse</b>		
Reusing things that would otherwise become waste is better for the environment than recycling them. Across Somerset there is a vibrant network of organisations that deliver great social outcomes (be it tackling isolation, reskilling those far from the labour market, supporting refugees) as well as environmental ones, and SWP wants to explore how it can best work with that network.		
<b>What</b>	<b>When</b>	<b>Why</b>
<b>2.1 Reuse at recycling centres</b>	2022/23 onwards	As recommended in the strategy agreed by the Board in September 2021, this will involve diverting goods suitable for reuse and repair at our sites, and working with third parties to ensure they are reused and/or repaired
<b>2.2 Community Action Groups</b>	2022/23 onwards	As recommended in the strategy agreed by the Board in September 2021, this will aim to develop a community group network with a designated coordinator that will help reuse groups work more efficiently, collaborate better, strengthen community cohesion, facilitate skills share and maximise existing assets. This will depend upon funding from the SWEEP fund.
<b>2.3 The Repair Bus</b>	2022/23 onwards	As recommended in the strategy agreed by the Board in September 2021, this will involve purchasing and fitting out a vehicle to become a mobile repair facility offering repair facilities to residents, to be used as a communications and education tool and support event and community groups. The concept is based on successful mobile 'library of things'. In its first year it will focus on WEEE (waste electrical and electronic items). Delivery of this action is dependent on securing external funding (a bid has been submitted).
<b>2.4 Reuse campaigns</b>	Ongoing	A campaign will be developed in support of the reuse strategy. Funding will be sought for further campaigns in the future.
<b>How will we measure success?</b>	<ul style="list-style-type: none"> <li>SWP reports quarterly to the board on reuse.</li> </ul>	

<b>3. Increasing recycling</b>		
When waste can't be avoided or reused, the best thing that can happen to it is that it is recycled properly. SWP is committed to collecting quality recycle— with 98% currently staying in the UK. The National Resources and Waste Strategy is focussed on quality and held up SWP's kerbside sort approach as an exemplar.		
<b>What</b>	<b>When</b>	<b>Why</b>
<b>3.1 Further plastic kerbside collections</b>	2022/23	Exploring whether we can trial the kerbside collection of soft/flexible plastic (e.g., bread bags, carrier bags, the film on punnets/ready meals) at the kerbside. This will be dependent upon

Business Plan 2022-27

			funding and industry support – SWP will not collect materials unless we are confident they are being properly recycled.
3.2	<b>Recycling even more at our HWRCs</b>	Ongoing	Exploring whether we can accept further 'hard to treat' materials at our recycling centres, including mattresses, expanded polystyrene and how we can work with organisations like Terracycle. Seek opportunities to improve our recycling centres, subject to development of viable solutions and robust business cases unlocking funding.
3.3	<b>Food waste in communal properties</b>	2023/24	Through Recycle More many communal properties accessed our kerbside food recycling. We will aim to ensure all communal properties have access to food recycling. The approach will be dependent upon future national policy and funding.
3.4	<b>Ensuring homes are built with recycling in mind</b>	Ongoing	Embedding our refreshed Developer's Guidance in local plans/unitary planning policies, engaging on planning applications and working with planners, developers and their agents will be critical to ensuring every home (especially flats) are built with recycling in mind.
3.5	<b>Recycling A-Z guide</b>	2022/23	With expanding kerbside collections, around 40 materials recycled at HWRCs, Terracycle schemes and other options for people to recycle different materials it can be a confusing picture. A comprehensive, up to date and user-friendly A-Z guide will help people understand all their reuse and recycling options in Somerset.
3.6	<b>Targeted campaigns</b>	Ongoing	Campaigns targeted at key peaks in waste (e.g., Christmas – food waste, packaging/ plastics, Halloween – pumpkins, Easter – plastic packaging, Summer – garden waste and BBQs).
3.7	<b>Local Engagement Programme</b>	2023/24	Local Engagement Programme delivering 100 activities and interventions per year in deprived and poor recycling areas (Suez social value commitments)
3.8	<b>Service guide</b>		Publish and distribute to every household an annual service guide including a collection day calendar. To embed new service, encourage sound recycling behaviours and provide the information residents need to manage their waste effectively.
<b>How will we measure success?</b>			<ul style="list-style-type: none"> <li>• Progress on individual projects reported via the quarterly board report</li> <li>• Headline recycling rate (both kerbside and recycling centres)</li> <li>• Annual Recycling Tracker showing what happens to our recycling</li> <li>• Carbon measurement of recycling and using that (not weight) to prioritise</li> </ul>

<b>4. Decarbonising our operations (inc. residual waste)</b>		
What we do (i.e., recycling, encouraging reuse and reduction) is a much more significant impact on our carbon footprint than how we do it, but it is still crucial for us to continuously improve in this area. Despite everything we do to reduce waste, encourage its reuse and recycling there will still be residual waste for the foreseeable future, and we need to decarbonise how we manage this waste.		
<b>What</b>	<b>When</b>	<b>Why</b>
<b>4.1 Heat offtake from Avonmouth</b>	Ongoing	When Viridor opens their Plastics Processing Facility at Avonmouth, hot commissioning having commenced during September 2021, it will utilise a proportion of the low-level heat generated at the Energy from Waste facility. SWP will continue to work closely with Viridor to encourage the full use of heat – should Avonmouth be able to operate as a combined heat and power facility, dependent on the provision of a local heat network requiring support from Bristol City Council, it will be even more environmentally efficient.
<b>4.2 Carbon capture &amp; storage</b>	Ongoing	Viridor have recently committed to achieving net negative carbon emissions and with further investment (backed by Government subsidy) at 5 of their Energy from Waste sites (inclusive of Avonmouth) to reaching to this target, SWP will continue to work closely with Viridor to ensure that Avonmouth sees this technology installed at the earliest viable point.
<b>4.3 Roll-out electric supervisors vans</b>	September 2022	An initial five electric supervisor's vans have been ordered for Evercreech depot (serving the East of the County). It is cost neutral compared to their diesel equivalents.
<b>4.4 Pilot alternative fuels in our fleet</b>	Ongoing	Work with our vehicle suppliers (primarily Romaquip for recycling vehicles and Dennis Eagle for refuse vehicles) to trial electric vehicles in Somerset. Learn from the current trial of Hydrogenated Vegetable Oil for plant operating within Evercreech depot to identify if it is cost effective to roll this out further,
<b>4.5 Partial refleet of refuse vehicles</b>	2022/23 - 2025	Learning from the trial electric refuse vehicle our trials and emerging technology will inform the partial refleet, as will future national legislative change and changes in tonnage/behaviour (to inform the number and type of vehicles we require).
<b>4.6 Green infrastructure at depots</b>	2022/23	Photovoltaic panels will be installed at our Evercreech and Walford Cross depots – the high and stable use of electricity at the sorting and baling facilities make them particularly suitable. Business cases for further green infrastructure will be developed/
<b>4.7 Reduce carbon intensity of fleet</b>	Ongoing	Technology onboard our new fleet (CMS Supatrak) will enable monitoring of driving (harsh braking/acceleration, idling), and Suez will utilise this to improve driver behaviour.
<b>How will we measure success?</b>	<ul style="list-style-type: none"> <li>SWP reports quarterly to the board on key projects and provides the board with quarterly reports with on EfW that ensures transparent access to key data (e.g., on emissions).</li> </ul>	

<b>5. Tackling non-household waste</b>		
<p>SWP's delegated powers from District and County Councils are in relation to household waste and whilst for a number of years SWP has provided services to many of Somerset's schools, other than that our remit has not extended to the waste produced in our businesses and public sector offices. The joint work across the council to tackle the climate emergency we face has led to us expanding our remit to help drive improvement in this area.</p>		
<b>What</b>	<b>When</b>	<b>Why</b>
<b>5.1 Schools: Recycle More roll-out</b>	2022/23	Transition to Recycle More for schools (separating fibre from other materials and adding in plastic pots, tubs and trays to the plastic bottles, cans, paper, card and food they can already recycle). Combined with improving how we use data and feedback performance to schools we expect this to drive improved performance. Annual review of pricing model (working with Support Services for Education) so that we transition to a fuller 'producer pays' principle and incentivise behaviour change.
<b>5.2 Public sector estate</b>	2022/23	In 2019/20 SWP developed a business case which demonstrated the financial savings and environmental benefits from a coordinated approach to waste collection across the County Council and district partners – aligning that service more with the household service (i.e., a broader range of recycling and greater separation). As the Somerset authorities move towards becoming a unitary authority this project has been transferred to the 'Assets and ICT' workstream, though SWP will still support and seek to expand to cover more public sector partners in Somerset.
<b>5.3 Business waste: collaborative procurement</b>	Ongoing	Seek to pilot collaborative procurement for recycling and waste in one or more of Somerset's market towns – reducing costs for businesses, improving environmental outcomes and aligning with local needs (working jointly with the industry and supply chain workstream).
<b>5.4 Green Business Support</b>	2022/23	Through our work on the joint Climate Emergency SWP developed a proposal for green business support – providing business with trusted guidance and support to reduce their carbon emissions and become more resource efficient and circular. This is now being led by Economic Development team, with SWP supporting. A pilot project in 2021/22 should inform the future approach.
<b>5.5 Helping business respond to national legislation</b>	Ongoing	Consider the potential changes to legislation for business waste recycling around DRS, EPR, business waste recycling (inc. food) and how SWP can work in partnership with others to shape Somerset to be an exemplar for household-like recycling from businesses. Timing will depend upon the Government confirming final policy and timescales.
<b>How will we measure success?</b>	<ul style="list-style-type: none"> <li>SWP reports quarterly to the board on key projects</li> </ul>	

<b>6. Working with others</b>		
Partnership is at the heart of what SWP do – how we work with our contractors/wider workforce, the public and other parts of the public sector.		
<b>What</b>	<b>When</b>	<b>Why</b>
<b>6.1 Parish Councils</b>	Ongoing	Review, refresh and then explore how we can share our toolkits and guidance (e.g. on composting, food waste, and setting up a plastic pot, tub and tray collection point) for those town and parish councils who want to take more local action on climate change. This will include evaluating a pilot scheme to work with a parish council to promote home composting (linked to our subsidised compost bin offer). Attending parish cluster meetings and meetings of environmentally motivated/interested groups is a key part of ensuring we remain close to our communities.
<b>6.2 Local Community Networks</b>	2022/23	Explore how we can use our data to be more accountable to local areas (e.g., the Local Community Networks to be developed as part of the move to a Unitary Authority), and to work in partnership with those areas to use this to drive improvement.
<b>6.3 Developing partnerships</b>	Ongoing	With limited resources, we need to develop strong partnerships with others in order to ensure that we cost-effectively drive people to change behaviours. Developing strategic partnerships with others, especially third sector organisations working in areas with low recycling performance, is a crucial means to do this. SW:EEP funding will potentially help support behavioural change in communities.
<b>6.4 Engagement with front-line staff</b>	Ongoing	Our people are our most important asset and act as our ambassadors. Working closely with Suez and Viridor it is important that SWP engages closely with our frontline staff, especially given the pressures on the workforce from Covid and the driver shortage. SWP attends an Employee Engagement forum
<b>How will we measure success?</b>	<ul style="list-style-type: none"> <li>SWP reports quarterly to the board on key projects</li> </ul>	

## 7. Improving the customer experience

Delivering excellent customer service is a critical part of our vision. The scale and complexity of this is significant, with multiple complex systems interacting between contractors, SWP and partner authorities. Over 20 million collections are made each year, over 1.5m visits to recycling centres annually, and over 15,000 followers on Facebook.

<b>What</b>	<b>When</b>	<b>Why</b>
<b>7.1 Using data effectively</b>	2022/23	The in-cab devices (when used properly) provide significant amounts of data that we can use to target individual behaviours (e.g., sending automated letters to a household that repeatedly don't recycle) and to target communities (identifying areas where presentation of additional refuse bins is at its highest). SWP needs to improve its capability in handling this data, and in combining this data with data on tonnages collected to provide real insights.
<b>7.2 Growing our channels</b>	Ongoing	This will include innovation - developing our app, , an automated website assistant (Chatbot) that can answer queries (being piloted currently for Recycle More), using new channels like Nextdoor, mass emailing tools (like garden waste renewals) as well as growing existing channels like Facebook and improving the user-friendliness of our online reporting system.
<b>7.3 Website review</b>	2022/23	SWP intended to review our website to consider issues like how we better support businesses and encourage waste reduction and reuse, but it is likely that this will also need to be informed by the transition to a Unitary authority.
<b>7.4 Customer contact review</b>	2022/23	A key issue for the transition to a new unitary authority will be how they improve the customer experience. With around 100,000 customer contacts (inc online), and a Customer Relationship Management (CRM) system (My Waste Services) integrated with SUEZ and our district partners, the impact on SWP from this will be significant. To support a smooth transition SWP have extended their CRM system contract from September 2021 on 2 + 1 + 1 year basis (with early termination ability).
<b>7.5 Processes and Policy</b>	2022/23	Implementing the action plan that resulted from the GDPR compliance audit that SWP requested to support our ongoing work in this area, refreshing our social media policy, reflecting any changes from the transition to Unitary (e.g., how we use social media as a customer service channel, unlike our partners)
<b>7.6 Assisted collection review</b>	2022/23	Periodic review of our database of assisted collections to ensure that customer still require the service. The intention is to do this once the Recycle More roll-out has concluded.
<b>7.7 Improve processes around occupation of new homes</b>	2022/23	Implement process improvements to ensure that notification of new property occupation/home ownership is seamless and that we take advantage of this opportunity to change behaviours. A module has been procured for our CRM that reduces the six week delay in registering new

Business Plan 2022-27

			properties. It has been deployed into our systems and is currently receiving daily updates from SWAT and SSDC. This will be extended to other partners.
7.8	<b>Education and enforcement</b>	Ongoing	SWP work closely with contractors and partners to resolve complex issues, investigate complaints, find solutions to problems and clamp down on abuse (including trade waste abuse & side/excess waste). Enforcement remains the last option. The transition to Unitary provides an opportunity to rethink how we enforce across all the unitary authority's services. SWP have paused the work that was proceeding to delegate powers and will instead focus on how the new unitary authority enforces effectively and consistently.
7.9	<b>HWRC Signage review</b>	2022/23	Signage review of all HWRCs to make it easier for the public to understand what can be recycled, what happens to it, how to keep safe – and hence drive behaviour change. Ongoing programme of maintenance and safety improvements to ensure our ageing network of sites remain effective
<b><i>How will we measure success?</i></b>			<ul style="list-style-type: none"> <li>• Proportion of online transactions, level of complaints, reach on key channels, resolution at first point of contact, quarterly reporting to the board.</li> </ul>



## 8. Supporting wider goals in Somerset

SWP spends approximately £50m of public money every year and our contractors employ well over 500 people. The close working relationships we have with all partners also provide a platform for progress on areas of common concern even where they are not within SWP's delegated responsibilities (e.g., dealing with fly tipping and recycling on the go). It is important that SWP looks beyond its delegated responsibilities to support the wider goals of all partners.

<b>What</b>	<b>When</b>	<b>Why</b>
<b>8.1 Tackling waste on the go</b>	Ongoing	Whilst street scene is a District Council responsibility, SWP wants to work with all partners to identify how we can learn from elsewhere to improve recycling on the go. SWP are supporting District Council partners that are piloting recycling on the go and working with Chard Town Council similarly. This will form part of work as we transition to a Unitary authority.
<b>8.2 Tackling fly tipping</b>	Ongoing	Whilst managing fly-tipping is a District Council responsibility, SWP wants to work with all partners to identify how we can learn from other parts of the country (e.g., Hertfordshire) to improve the way we tackle fly-tipping. This will form part of work as we transition to a Unitary authority.
<b>8.3 Supporting local businesses and those far from the labour market</b>	Ongoing	Ensuring we realise the social value commitments from Suez: <ul style="list-style-type: none"> <li>• 5% of collection contract spend retained in Somerset, with increasing proportion spent with SMEs, micro-businesses and third sector organisations</li> <li>• 2 campaigns delivered each year to improve the capture of materials</li> <li>• 2 work placements per year (16 in total) from 2022-23 onwards for young people, including NEETs and care leavers,</li> <li>• 2 community payback scheme placements per year (16 in total) from 2022-23 onwards for low level offenders,</li> <li>• Ensuring 5% of staff are in apprenticeships every year of the contract</li> </ul>
<b>8.4 Supporting our most vulnerable</b>	Ongoing	In addition to training all collection staff to be dementia aware, SWP will seek to identify other ways in which we can support the wider agendas of our partner authorities – for example how we can more effectively use the eyes and ears of our staff on the ground to better support vulnerable residents and streamline this process.
<b>How we will measure success</b>		<ul style="list-style-type: none"> <li>• SWP reports quarterly to the board on key projects, with SUEZ providing a social value report quarterly.</li> </ul>

<b>9. Enabling Activities</b>		
Some of SWP's less visible activities are essential to enable both our front-line services and our ambitious programme of change.		
<b>What</b>	<b>When</b>	<b>Why</b>
<b>9.1 Depot infrastructure improvements</b>	2022-23	Having completed the redevelopment and expansion of Evercreech and Walford Cross depots, in Spring/Summer 2022 Williton (Roughmoor) depot will be redeveloped. Photovoltaic panels will be installed at Evercreech and Walford Cross depots during 2022. Further carbon reduction initiatives at our depots will be explored
<b>9.2 Contract reviews</b>	2022/23	To review the collection contract and recycling credits mechanism following the roll-out of Recycle More, potential national legislative change (extended producer responsibility, deposit return scheme, collection consistency inc garden waste) and to reflect a post Covid world.
<b>9.3 Contract Management (inc health &amp; safety)</b>	Ongoing	Robust management of our major contracts underpins everything we do. This is particularly important given that we now have contracts with Biffa and Viridor following Viridor's restructure, with the potential takeover of SUEZ by Veolia, and due to the commercial pressures that have resulted from Covid and the driver shortage.
<b>9.4 Influencing national policy</b>	Ongoing	With major central government consultations expected, it will be crucial that SWP uses its reputation as a sector leader, and continues working through national bodies and regionally.
<b>9.5 Developing a long-term strategy</b>	2023/24	A long-term framework to 2050 is needed to align with Central Government's Resources and Waste Strategy to set out our ambition, the outcomes we want to achieve, our high-level targets and our over-arching approach. SWP are awaiting finalisation of national policy and also the transition to a Unitary authority to finalise their long-term strategy.
<b>9.6 Waste composition and recycling participation analysis</b>	2022/23	SWP last undertook a thorough waste composition and recycling participation analysis in 2018. Waste composition analysis helps us understand what Somerset residents are throwing away that could be reused or recycled, and recycling participation analysis helps understand more about people's recycling behaviours and hence what we can do to improve that. It makes most sense to do a full survey once Recycle More has been fully implemented.
<b>9.7 Business Continuity Planning</b>	Ongoing	Ensuring that robust Business Continuity Plans are in place and regularly reviewed, and that the lessons are learnt from the Business Continuity incident in Summer 2021 caused by the national Driver shortage
<b>9.8 Transition to a unitary authority</b>	2022/23	Governance, finance, customer contact and many other aspects of what SWP does will change as we transition to a Unitary Authority. Additionally, there are opportunities to explore potential synergies with other services.
<b>How will we measure success?</b>	<ul style="list-style-type: none"> <li>SWP reports quarterly to the board on key projects</li> </ul>	

## SWP Budget 2022 - 23

A draft Annual Budget for the forthcoming year will be brought to the December meeting of the Somerset Waste Board, with the final budget due in February 2022. A summary of the budget is included here in the Business Plan for information.

### Recycle More Implementation

The roll-out of the new Recycle More collection service is scheduled to be completed in February 2022. No savings as a result of the new contract will be taken from the Somerset Waste Partnership by any partner until all roll-out costs have been fully funded – ensuring that all partners benefit equitably. Savings are expected to be seen from Recycle More in 2022/23 once roll-out costs have been fully funded. These are reflected in each partner's MTFP. The overall annual savings are anticipated to be over £2m per annum.

The revenue costs associated with roll-out will be funded from a Recycle More Project Fund. This will cover the costs of recycling advisors (supporting people with the transition), communications and marketing and in-year transition costs (the additional costs of the current service model as opposed to Recycle More, based on forecast tonnage and material values. This also includes an allowance for risk (such as the risk that capital borrowing rates change before funds are actually drawn down). An equalisation reserve will be established after the roll-out period in order to smooth out potential fluctuations in recyclate revenue, built up from 20% of forecast annual recyclate revenue.

### Financial risks

Key financial risks are:

- 1) Covid-19 has had an unprecedented impact on services, and it has not gone away. Additional safety measures are still in place and at the time of writing there were still no confirmed cases of workplace transfer for SWP and its contractors, which is something we can be proud of. Covid-19 is leading to changed consumer behaviour and is not clear if and when we will return to 'normal'. SWP have provided funding for the direct impacts of Covid, and commercial and legal discussions are ongoing with our collection contractor about the ongoing impact.
- 2) The national driver shortage had a severe impact on services in the summer of 2021, and whilst the immediate issues for SWP were addressed, the underlying national issue has not gone away. Commercial and legal discussions are ongoing with our collection contractor about the ongoing impact.
- 3) National legislative change (extended producer responsibility, deposit return scheme, collection consistency) is expected to be clarified in Spring 2022. This is likely to have major operational and financial implications for SWP and every other waste authority.

**Draft Budget 2022-23**

		<b>SCC</b>	<b>MDC</b>	<b>SDC</b>	<b>SSDC</b>	<b>SWaT</b>
21/22 Base Budget		31,443,997	3,208,321	3,236,920	4,803,484	4,352,935
Correct Base Indexation		0	34,928	35,790	52,292	48,200
Inflation - Collection	<b>6.11%</b>	0	257,539	263,748	385,355	355,208
Inflation - Disposal	<b>1.41%</b>	(383,217)	0	0	0	0
Landfill Tax	<b>2.95%</b>	34,900	0	0	0	0
Household Growth	<b>0.93%</b>	0	29,006	39,401	66,809	39,895
Garden Waste	<b>11.9%</b>	0	63,912	73,699	128,091	105,148
Volume Growth	<b>0.79%</b>	185,000	0	0	0	0
Recycling Credits		103,940	(21,912)	(21,743)	(33,454)	(26,840)
Salaries	<b>2.00%</b>	11,440	2,744	2,914	4,084	3,818
Transfer Station & Other		10,520	1,642	(843)	3,041	71
Garden & Bulky Income	<b>12.0%</b>	0	(65,909)	(73,535)	(131,839)	(103,257)
Financing - PV & E-RCV		0	8,227	8,241	12,295	11,237
Covid-19 Costs		0	125,867	126,086	188,119	171,927
Proposed Savings		(715,300)	(123,799)	(123,961)	(169,573)	(157,667)
22/23 Draft Budget		30,691,280	3,520,566	3,566,716	5,308,703	4,800,676
<b>Increase / (Decrease)</b>		<b>(752,717)</b>	<b>312,245</b>	<b>329,797</b>	<b>505,219</b>	<b>447,740</b>
<b>Percentage</b>		<b>-2.4%</b>	<b>9.7%</b>	<b>10.2%</b>	<b>10.5%</b>	<b>10.3%</b>

# Equality Impact Relevance Check Form



The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. This tool will identify the equalities relevance of a proposal, and establish whether a full Equality Impact Assessment will be required.

What is the proposal?	
Name of the proposal	SWP Annual Action Plan and Business Case
Type of proposal (new or changed Strategy, policy, project, service or budget):	Update report / AP & BC presentation.
Brief description of the proposal:	A plan that sets out SSDCs priority projects and business case
Name of lead officer:	James Divall

You should consider whether the proposal has the potential to negatively impact on citizens or staff in the following ways:

- Access to or participation in a service,
- Levels of representation in our workforce, or
- Reducing quality of life (i.e. health, education, standard of living)

A negative impact is any change that could be considered detrimental. If a negative impact is imposed on any citizens or staff with protected characteristics, the Council has a legal duty to undertake a full Equality Impact Assessment.

Could your proposal negatively impact citizens with protected characteristics? (This includes service users and the wider community)	<b>NO</b>
Could your proposal negatively impact staff with protected characteristics? (i.e. reduction in posts, changes to working hours or locations, changes in pay)	<b>NO</b>

<b>Is a full Equality Impact Assessment required?</b>	<b>NO</b>
<b>If Yes,</b> Please provide a brief description of where there may be negative impacts, and for whom. Then complete a full Equality Impact assessment Form	
<b>If No,</b> Please set out your justification for why not.	
Many of the actions in the business plan relate to the implementation of decisions already taken by the Somerset Waste Board and Equalities Impact Assessments were undertaken at the time. EIA's will be carried out as appropriate as future review and actions arise. The decision to carry out an EIA in most cases will be delegated to the SWP's Managing Director, or if significant, then they will be returned to the Somerset Waste Board prior to commencing development.	
Service Director / Manager sign-off and date	Nicola Hix 01.02.2022
Equalities Officer sign-off and date	Dave Crisfield 1 <sup>st</sup> February 2022

## Future Chard Strategy

Executive Portfolio Holder:	Cllr Jason Baker, Area West Portfolio Holder
Strategic Director:	Peter Paddon, Acting Director of Place & Recovery
Lead Officer:	Anna Matthews, Chard HSHAZ Project Manager
Contact Details:	anna.matthews@southsomerset.gov.uk or 01935 462958

## Purpose of the Report

1. The purpose of the report is to provide District Executive with an update on the Future Chard Strategy public consultation and to seek their recommendation for adoption by Full Council.

## Forward Plan

2. This report appeared on the District Executive Forward Plan for January 2022 and was postponed until the February meeting.

## Public Interest

3. The 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:
  - a. notes the feedback provided through the public consultation
  - b. offers feedback on the strategy, which has been updated in response to the public consultation
  - c. recommends the Future Chard Strategy for adoption by Full Council.

## 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 could be



## South Somerset

### District Council

particularly vulnerable to closures. A recent example was the closure of Oscar Mayer, where more than 800 jobs were lost to the town, representing 15% of jobs in the town at the time.

- The strategy seeks to address these issues by setting out a long-term vision for Chard and the steps needed to reach it. The place-based approach tests a new way of working for SSDC, piloted in Chard due to its particular set of challenges. It was intended that, if successful, it could be rolled out to other towns.
- 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 Somerset Council, who will have the opportunity to take the lead in delivery for Chard as well as developing similar strategies for other towns.

### 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.
- PER Consulting was 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 provided an understanding of Chard's needs, from its current strengths and weaknesses to its future opportunities and threats. The insight drawn from this led to the proposed long-term vision, priorities and action plan for the short, medium and long term set out in the Future Chard Strategy.
- In September 2021, District Executive reviewed the draft Future Chard Strategy and approved it for public consultation.

### Public Consultation

- Public consultation was conducted at 3 in-person events at Chard Guildhall:
  - 10am to 2pm – Saturday 23 October
  - 9am to 4pm – Monday 25 October
  - 12pm to 8pm – Tuesday 26 October.



## South Somerset District Council

15. A range of times of day were chosen to encourage the greatest participation. It was advertised through the press, on social media and via posters displayed around the community. Over 100 people attended over the course of the three days.
16. Display boards presented a summary of the Future Chard Strategy and attendees were asked to respond to a number of questions in order to seek their feedback. They were also able to pick up a copy of the draft Strategy, Action Plan and Social & Economic Baseline Report.
17. A review of the key themes arising from the consultation are set out below. In response to these themes, the Strategy has been updated where necessary. These are noted below.
18. The revised Future Chard Strategy and Action Plan are included as Appendix A and B. The Social & Baseline Report remains unchanged and is included as Appendix C.

### Themes Arising and Response

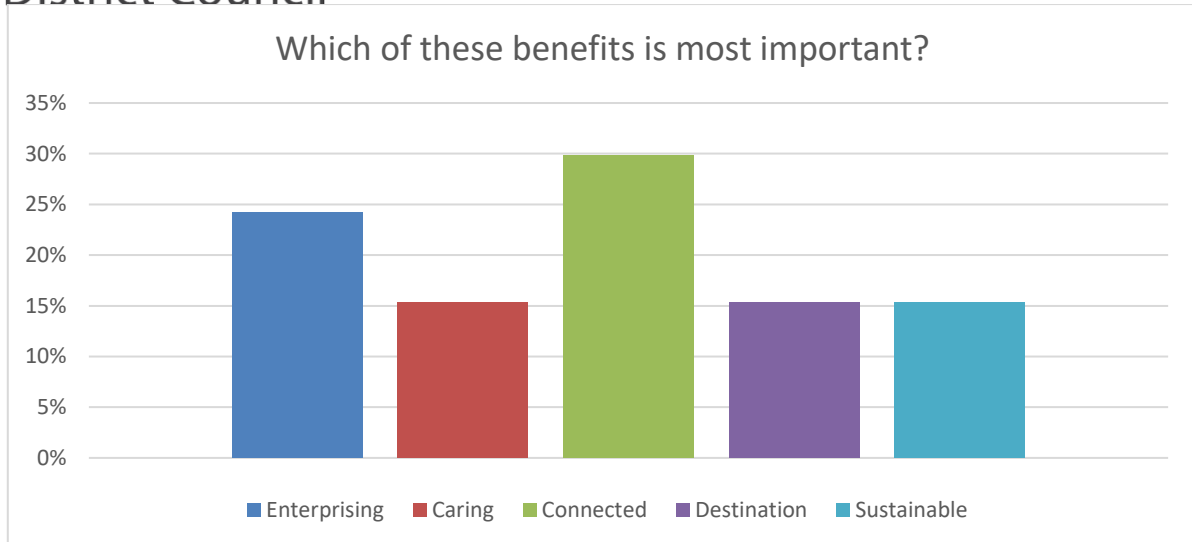
#### Summary

19. Overall, the comments received during the public consultation supported the content and direction of the Strategy. In particular, there was a strong message in favour of the Strategy's recommendations around:
  - re-engaging with the community over growth plans to address concerns about housing development and associated infrastructure
  - resolving traffic connectivity issues
  - improvements to the town centre (many of which are already being addressed by the High Street Heritage Action Zone).
20. As mentioned above, some amendments to the Strategy have been made to draw out the nuances expressed. A review of the key themes of the consultation data against each section of the Strategy is set out below.

#### Vision & Desired Outcomes

21. There is broad support for the vision and all 5 outcomes set out in the Strategy. The 'connected' and 'enterprising' outcomes resonated particularly strongly.





### SWOT analysis

22. Consultation respondents agreed with the SWOT (strengths/weaknesses/opportunities/threats) analysis, and gave particular weight to:
- Chard's industrial heritage (strength)
  - public transport (weakness)
  - active older population with skills and time to contribute (opportunity)
  - leisure centre as springboard for new opportunities (opportunity)
  - groups are starting to work together (opportunity)
  - worries over new housing developments and this not keeping step with local infrastructure and facilities development, plus impact on green spaces (threat)
  - lack of adult learning provision (threat).
23. These further points were raised and the Strategy document has been amended to reflect them:
- opportunity to do more to support local artisan trades (opportunity)
  - negative impact of redundant mill sites (threat)
  - lack of community-owned spaces (weakness) – this was already picked up within the detail of the Strategy and Action Plan but not mentioned in the SWOT.

### Ambition for Chard – Cross-Cutting and Priority Themes

24. The cross-cutting themes and priority themes were numbered in the draft Strategy but, following the consultation, it is felt that this wrongly implied an order of importance. Numbering has been removed in the revised version, to demonstrate the equal weighting of each theme.

### Cross-Cutting Theme: 'Make It In Chard' New Identity

25. Consultation participants recognised the need to clarify Chard's identity and were keen to project a positive reputation externally.

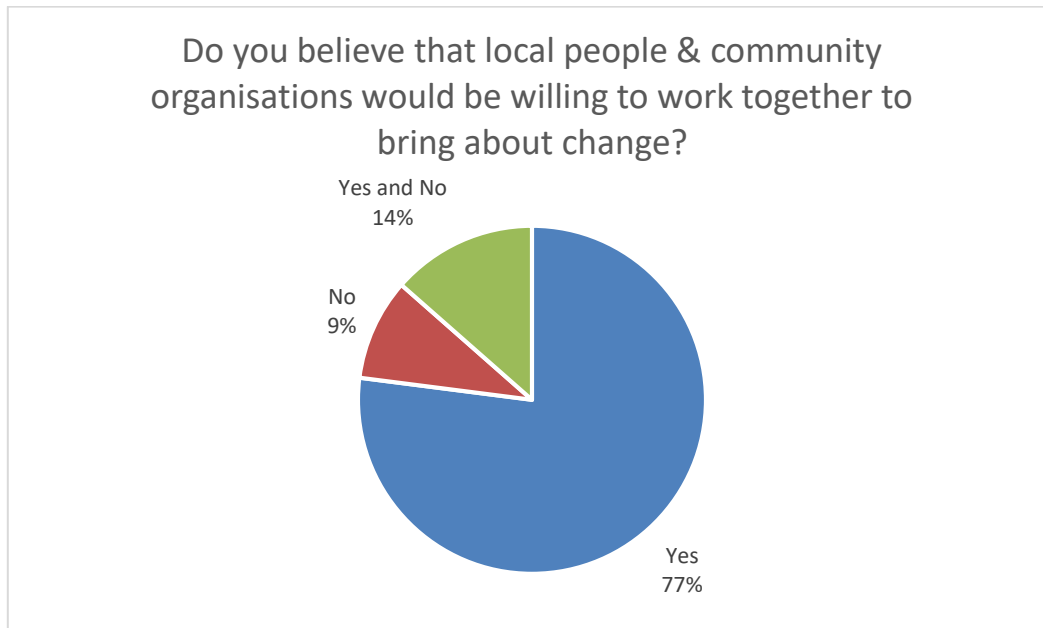


## South Somerset District Council

26. “Make It In Chard” as a concept was accepted, with support for marketing the town as a place where people can thrive, as well as promoting the physical characteristics of its town centre.
27. The consultation also showed support for the recommendation to deliver community events which align with the “Make It In Chard” message, in order to embed it across the town.

### Cross-Cutting Theme: Working Together

28. More than three-quarters of respondents stated that they believe people will work together to support the future of Chard.



29. Several organisations that attended the public consultation events stated that they would like to get involved. This is in addition to those who participated in the focus groups and one-to-one conversations that informed the development of the draft Strategy.
30. There was support for a medium-to-long-term plan and improved communication between those working to create change in Chard. Suggestions were made for a community hub building to facilitate this, which backs up the recommended action under the Town Centre Destination theme.

### Priority Theme: Economy

31. Comments relating to the economy centred on support and incentivisation for businesses and new businesses, training and employment support, and encouragement of a start-up culture all of which is included in the Strategy.
32. There were also comments in support of local artisans and the Strategy’s economy section has been tweaked to ensure that this is explicitly covered.



## South Somerset District Council

33. There was particular support for the Strategy's actions around establishing a business network for the town; establishing the employment hub and extending it into central training and advice provision; and nurturing an enterprise culture under the "Make It In Chard" banner.
34. In terms of incentivisation, SSDC is currently providing grants to local property owners/businesses to improve their shop fronts and high street premises through the High Street Heritage Action Zone (HSHAZ). HSHAZ is referenced under the Town Centre Destination theme.

### Priority Theme: Community, Health & Wellbeing

35. The consultation asked people to state which of the Community, Health & Wellbeing actions were most important to them. All the actions drew support, but those which drew greatest support were the five actions which address:
  - the expansion and quality of local health/wellbeing services
  - healthy eating
  - youth achievement awards
  - improved adult education provision
  - more sports and recreation facilities.
36. Individuals made additional suggestions for facilities for particular social groups: mothers and babies; children and adolescents; older people with support for 'ageing well'. This should be considered in the development of a community hub – see Town Centre Destination theme.
37. There were also a number of comments received regarding anti-social behaviour in the town, which is acknowledged in the text of the Community, Health & Wellbeing section of the Strategy. The Community, Health & Wellbeing outputs have been updated to ensure continued focus on this issue tackled by social engage.
38. Collectively, the suite of inputs/actions proposed by the Strategy seek to address disenfranchisement, social engagement and other complex circumstances which result in such issues.

### Priority Theme: Town Centre Destination

39. Feedback and comments received during the consultation relating to the town centre were very much in line with the Strategy and Action Plan, in particular:
  - the desire to address the number of empty premise
  - provide a more diverse town centre offer
  - support local businesses
  - improve wayfinding signage and connectivity for parking, cycling and walking.
40. There were a number of references made to the need for a community hub in the town centre – a free or affordable venue where local people could develop networks of support for others – which is part of the Action Plan but had not been clearly referenced in the key actions within the Strategy. The revised version adds in reference to this.



## South Somerset District Council

41. Responses also included suggestions for a number of town centre regeneration activities, which will be delivered over the next 2 years through the existing High Street Heritage Action Zone, such as:
  - investing in maintaining the historic properties on the high street
  - sprucing up the buildings
  - making more of the town centre's heritage when promoting the town
  - introducing lower kerbs for disabled access
  - providing larger spaces for gatherings/events.
42. Consultation responses also drew reference to the redundant mill sites and the need to renovate/repurpose/regenerate. At its September 2021 meeting, Full Council confirmed SSDC is keen to pursue 'Phase 2' of Chard Regeneration which would address the mill sites, but recognised that it is not feasible to enter into a Phase 2 programme of work at the current time, until significant external funding opportunities become available. As a key issue for Chard's town centre, it would be remiss of the Future Chard Strategy not to acknowledge. An action has therefore been added to reflect the current situation ("Address the redundant mill sites when external funding becomes available").

### Priority Theme: Housing & Connectivity

43. Many consultation responses were received relating to the development of new housing and the need for associated infrastructure to follow in-step, which provides evidence towards the Strategy's recommendation to re-engage with the community over planned development, as part of the Local Plan review. The Strategy's outputs for Housing & Connectivity have been clarified to include the development of infrastructure alongside housing delivery, and explicit reference to the Local Plan.
44. Many also pointed out the issues of traffic congestion and dominance in the town (with particular mention of Convent Junction). There was support expressed for better transport planning and infrastructure (for business as well as residents), the relief road, and better public transport.
45. A few respondents suggested a need for more/free parking. A thorough review of Chard town centre car parking – both public off-street car parks and free on-street spaces – was carried in the 2019 Transport & Movement Appraisal. This indicated that whilst on-street car parking was 77% utilised, the public car parks were only 35% utilised. It is therefore not considered necessary to update the Future Chard Strategy in relation to this suggestion.
46. Concerns over flooding were also raised at the consultation. The draft Strategy didn't mention flooding as it was mostly developed before the impactful events that Chard experienced in 2021. A new action has been added to the Strategy and Action Plan for partners to work together to address the flooding issues.
47. All of the existing recommended actions under the Housing & Connectivity priority theme drew support. There was a notably high proportion of respondents in favour of prioritising cycling and walking, in line with the recommendation to develop and deliver the Local Cycling and Walking Infrastructure Plan (LCWIP).

### Conclusion

48. Overall, the comments received during the public consultation are in support of the draft Strategy. Updates have been made to pick up the particular points set out above, and the new version of the Strategy and Action Plan are attached as Appendix A and B respectively.
49. District Executive is asked to review the updated documents and recommend to Full Council that they are adopted.
50. It is recognised that Local Government Reorganisation means that SSDC will not be the main delivery agency. Some of the actions are already part of existing SSDC work plans or projects (e.g. HSHAZ), however, and the Strategy was designed to be delivered through partnership. It will remain highly relevant to the new Somerset Council, who will have the opportunity to take the lead in delivery.

### **Financial Implications**

51. 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. (Note that some actions are part of existing work plans or projects where funding is already identified.)
52. The Strategy will put SSDC and/or the new Somerset Council in a strong position to apply for future strategic funds, along the lines of Town Deals or Levelling Up, thereby attracting new resources.

### **Legal implications (if any) and details of Statutory Powers**

53. None arising from this report.

### **Risk Matrix**

54. Not applicable to this report.

### **Council Plan Implications**

55. 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**

56. 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**



<i>An Equality Impact Relevance Check Form has been completed in respect of the Proposal?</i>	Yes
<i>The Impact Relevance Check indicated that a full EIA was required?</i>	No
<i>If an EIA was <b>not</b> required please attach the Impact Relevance Check Form as an Appendix to this report and provide a brief summary of its findings in the comments box below.</i>	
<i>If an EIA <b>was</b> required please attach the completed EIA form as an Appendix to this report and provide a brief summary of the result of your Equality Impact Assessment in the comment box below.</i>	
<b>Additional Comments</b>	
<p>The strategy has been developed in close consultation with organisations in Chard, to ensure that different voices in the community have been represented. It has also been subject to formal public consultation, plus informal online and in-person to those who may not have been able to come to us (e.g. older people's luncheon club). However, as the Strategy's action plan with its associated projects and service are delivered these will need to be subject to their own Equality Impact Assessments.</p>	

## Privacy Impact Assessment

57. Consultation responses were made anonymously and have been aggregated for analysis, therefore there are no issues arising.

## Background Papers

- Appendix A - Future Chard Strategy
- Appendix B – Future Chard Strategy Action Plan
- Appendix C – Social & Economic Baseline Report
- Appendix D – Equality Impact Relevance Check Form



# Future Chard Strategy 2021 -2035

## Contents

Introduction	2
Purpose of Strategy	6
Vision for Chard	7
Understanding Chard	10
Reflecting on Chard's Potential	15
Ambition for Chard	19
Cross Cutting Theme - Make it in Chard - New Identity	20
Cross Cutting Theme - Ways of Working	24
Priority Theme - Economy	27
Priority Theme - Community, Health and Wellbeing	30
Priority Theme - Town Centre Destination	34
Priority Theme - Housing and Connectivity	37
Action Plan and Delivery	40

## Figures

Figure 1: Chard; a history of achievements	45
Figure 2: Chard Strategic Location	46
Figure 3: Vision Diagram and Strategic Outcomes	47
Figure 4: Chard: Indices of Deprivation 2019	48
Figure 5: Chard: Key Features & Assets	49
Figure 6: Priority Themes for intervention	50





## 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 4  
Table 1: South Somerset Settlement Hierarchy

Location	Population (2011)	%	Employment (2019)	%
Yeovil	45,800	28.4	30,500	46.9
<b>Chard</b>	<b>13,100</b>	<b>8.1</b>	<b>5,300</b>	<b>8.2</b>
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)

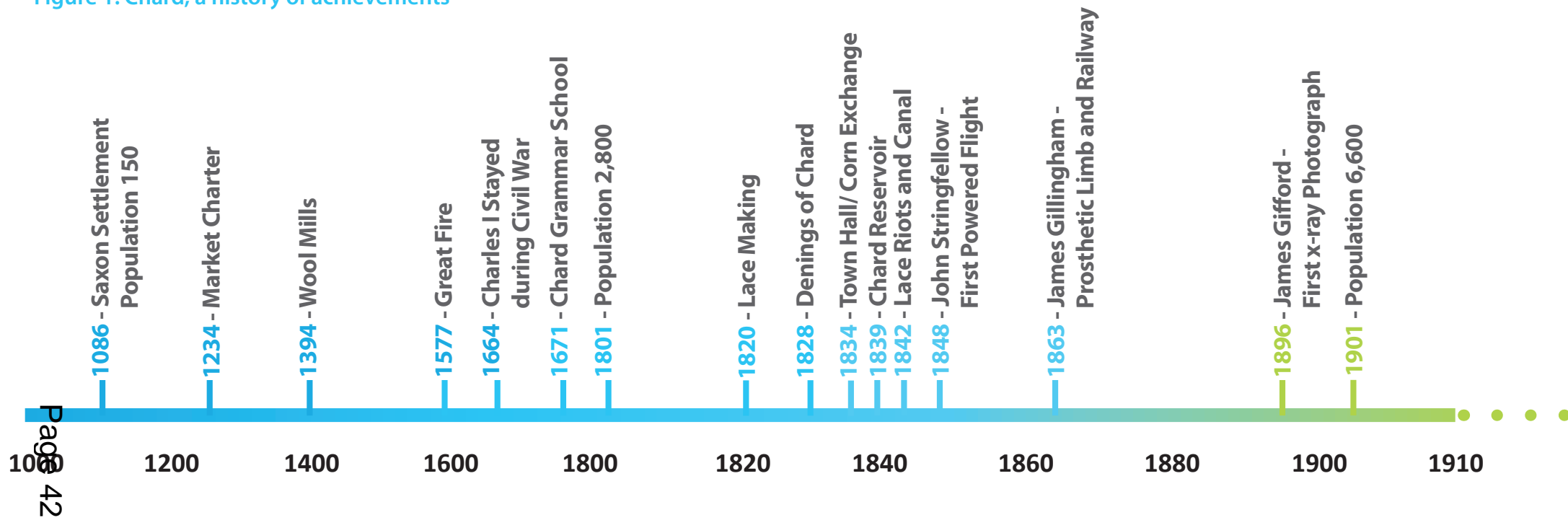


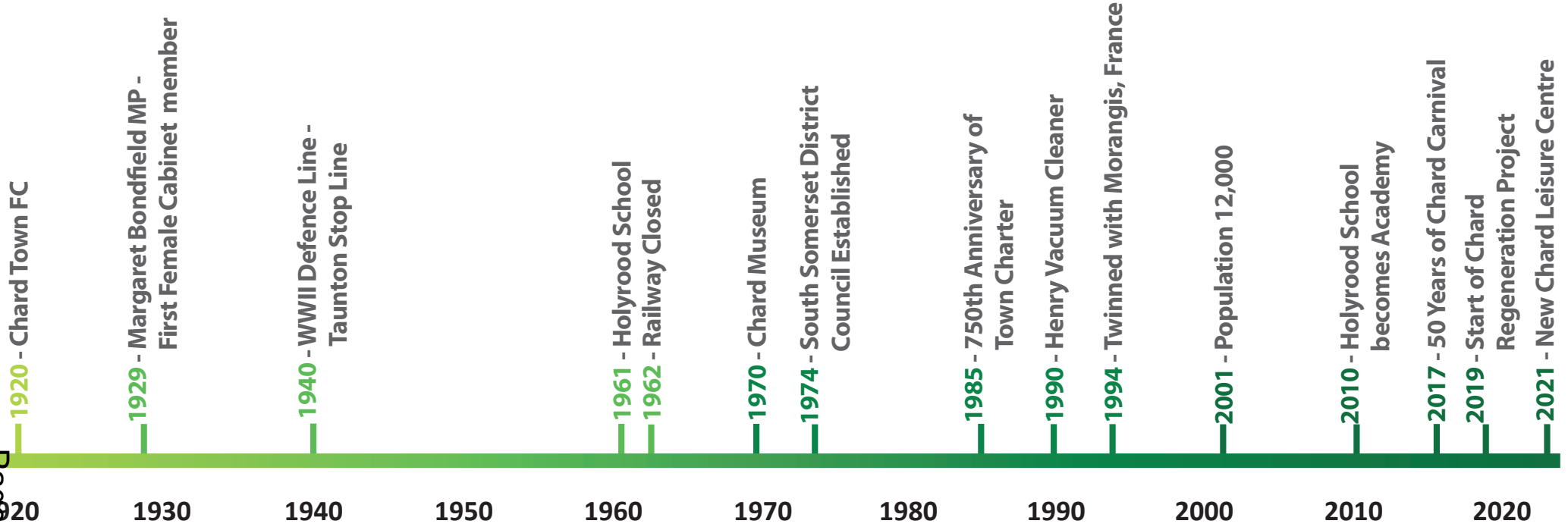
The town is well connected to the regional road network with the A30 and A358 both running through it, connecting on to the A303 and the M5 at J25 near Taunton within 25-minute drive. Chard is just 7 miles from the main line rail stations at either Crewkerne or Axminster over the Devon border.

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 1683, 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

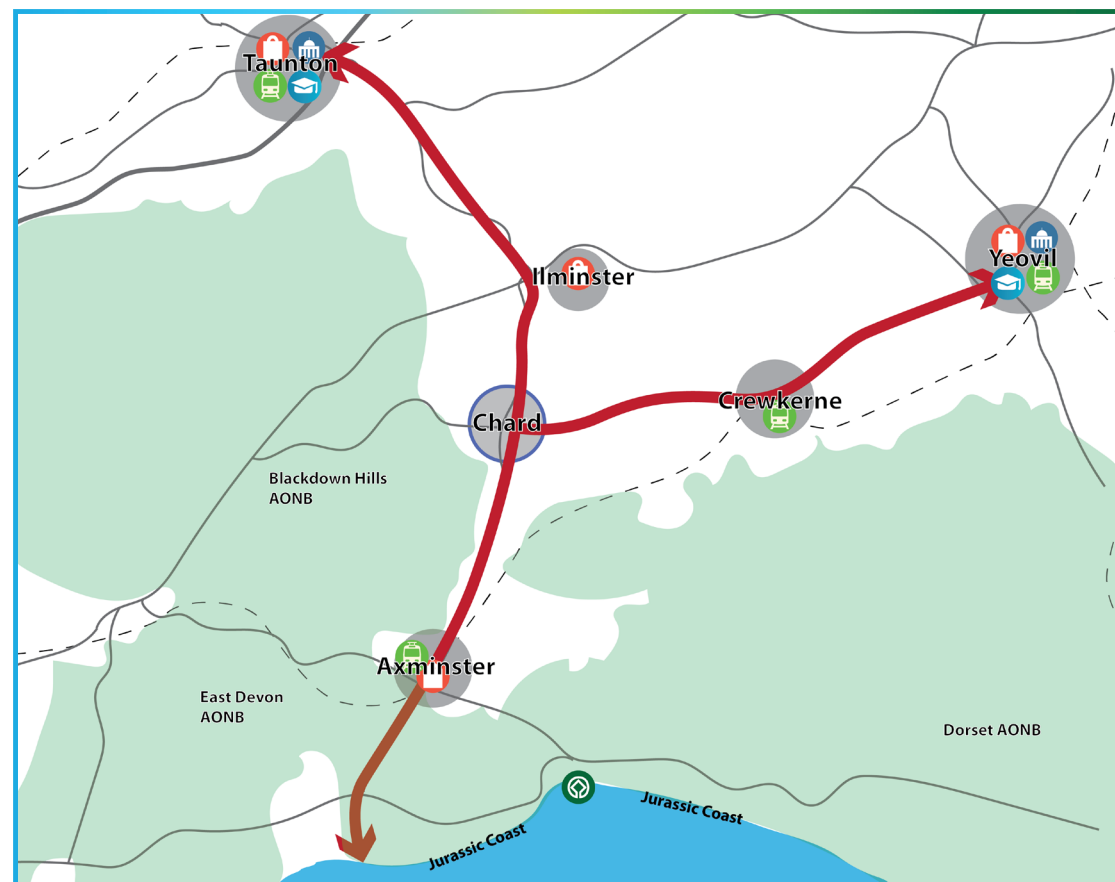




The physical regeneration and growth of Chard has been guided over the past decade by the Chard Regeneration Plan (LDA Design September 2010). This has framed the critical priorities for the town centre improvements, delivery of new housing growth and sports and leisure provision. Work continues to see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



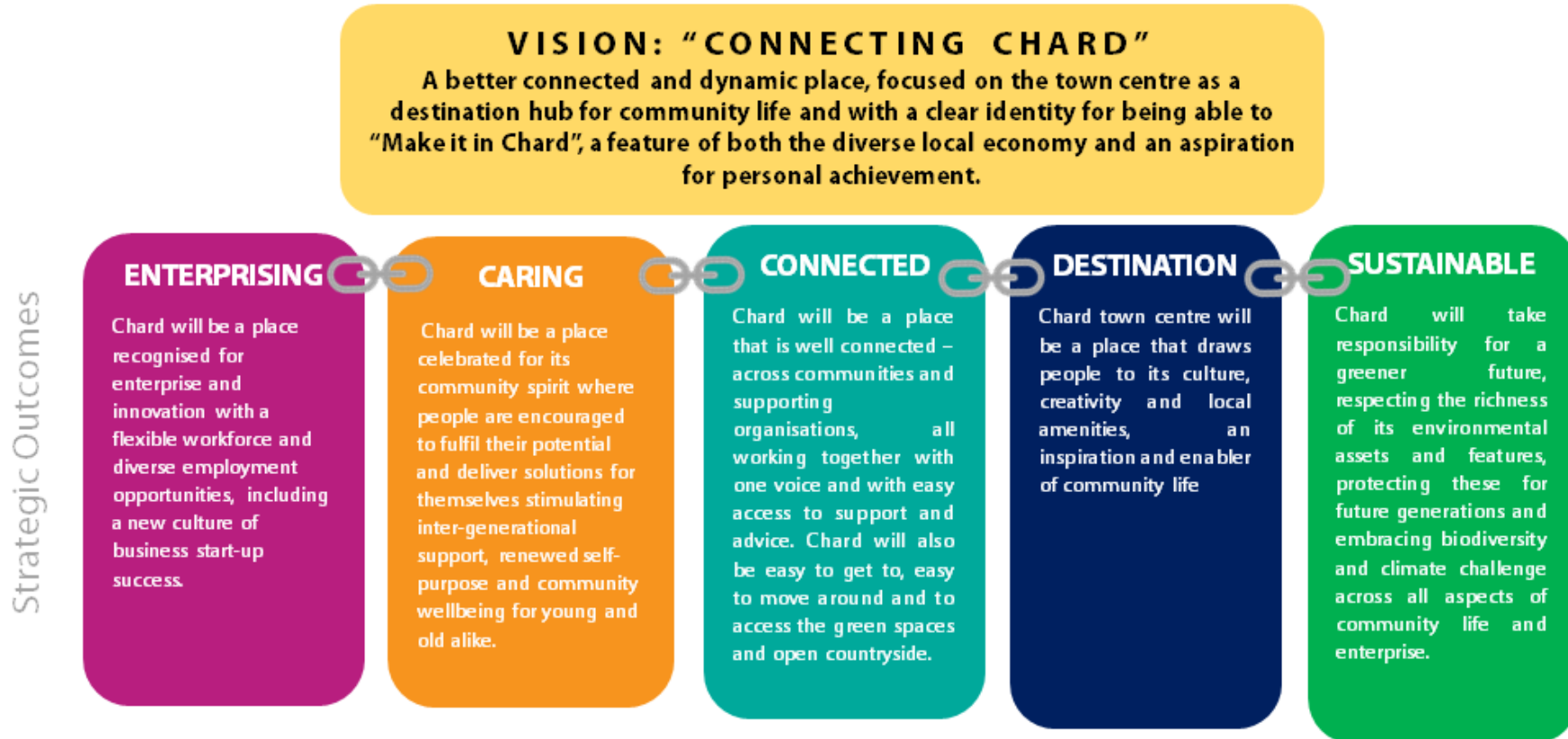
*A better connected and dynamic place, focused on the town centre as a destination hub for community life and with a clear identity for being able to “Make it in Chard”, a feature of both the diverse local economy and an aspiration for personal achievement*



Page 46



Figure 3: Chard Vision and Strategic Outcomes



Page 47

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.



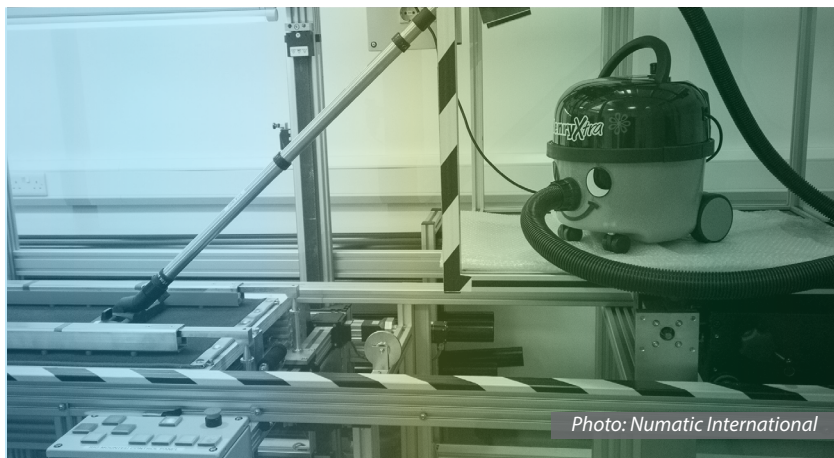
## Understanding Chard

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.

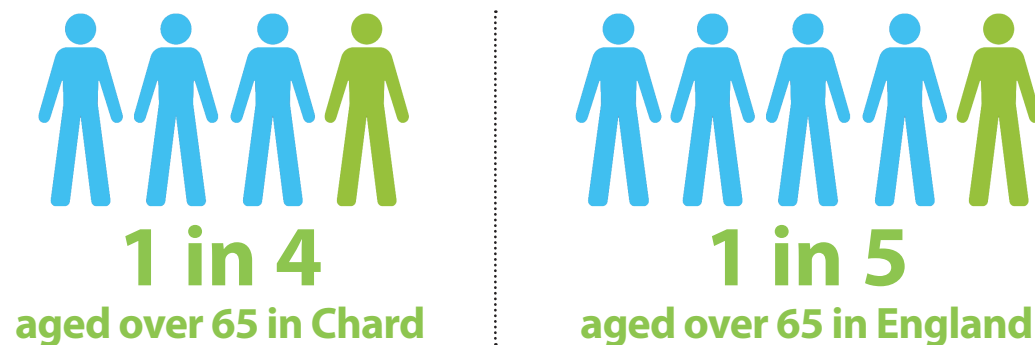


This works for those with access to private cars but disconnects with those in greatest need and reliant on public transport which has eroded over the years throughout rural communities as public subsidies are curtailed.

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

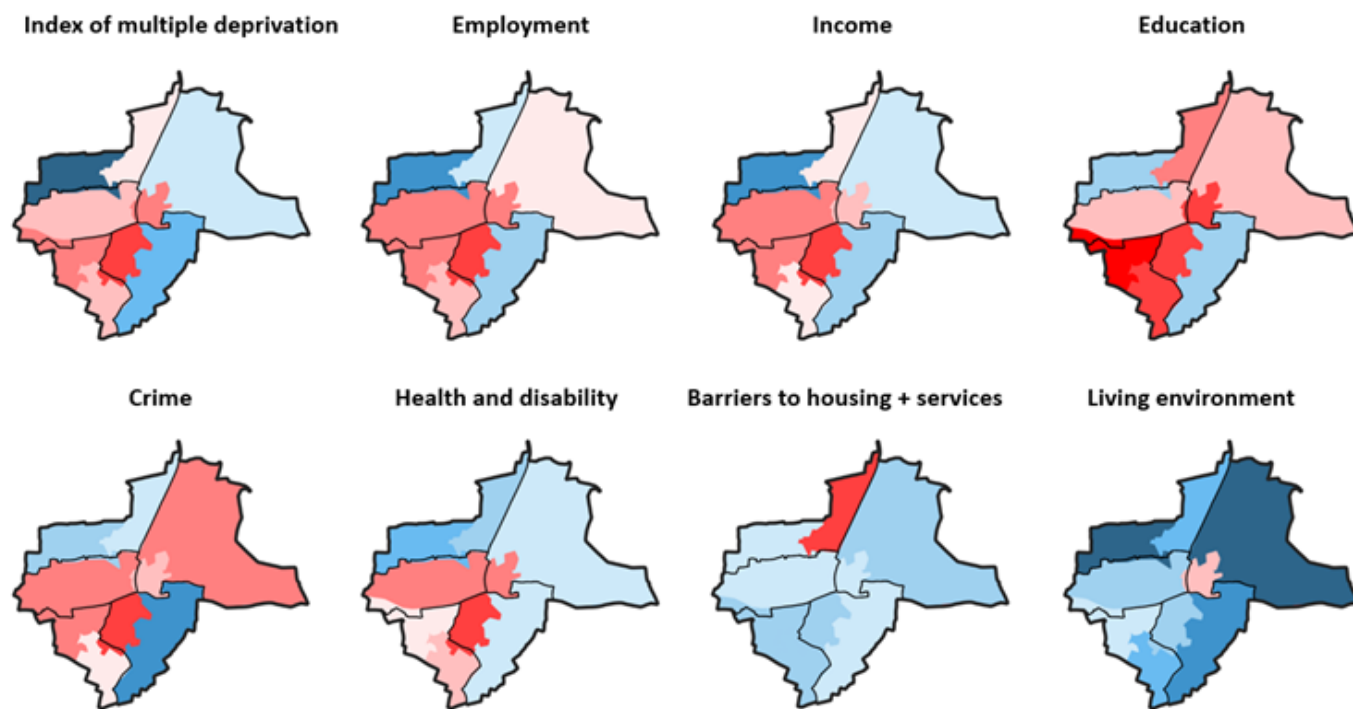
The prosperity and life opportunities of residents living in Chard is unequal, with large differences in deprivation scores found across the town. The maps alongside show the different domains of deprivation by small geographical areas (Lower Super Output Areas), as provided by the ONS.

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
<b>Total</b>	<b>137</b>	<b>100</b>	<b>100</b>

Source: SSDC Retail Monitoring (January/February 2021)

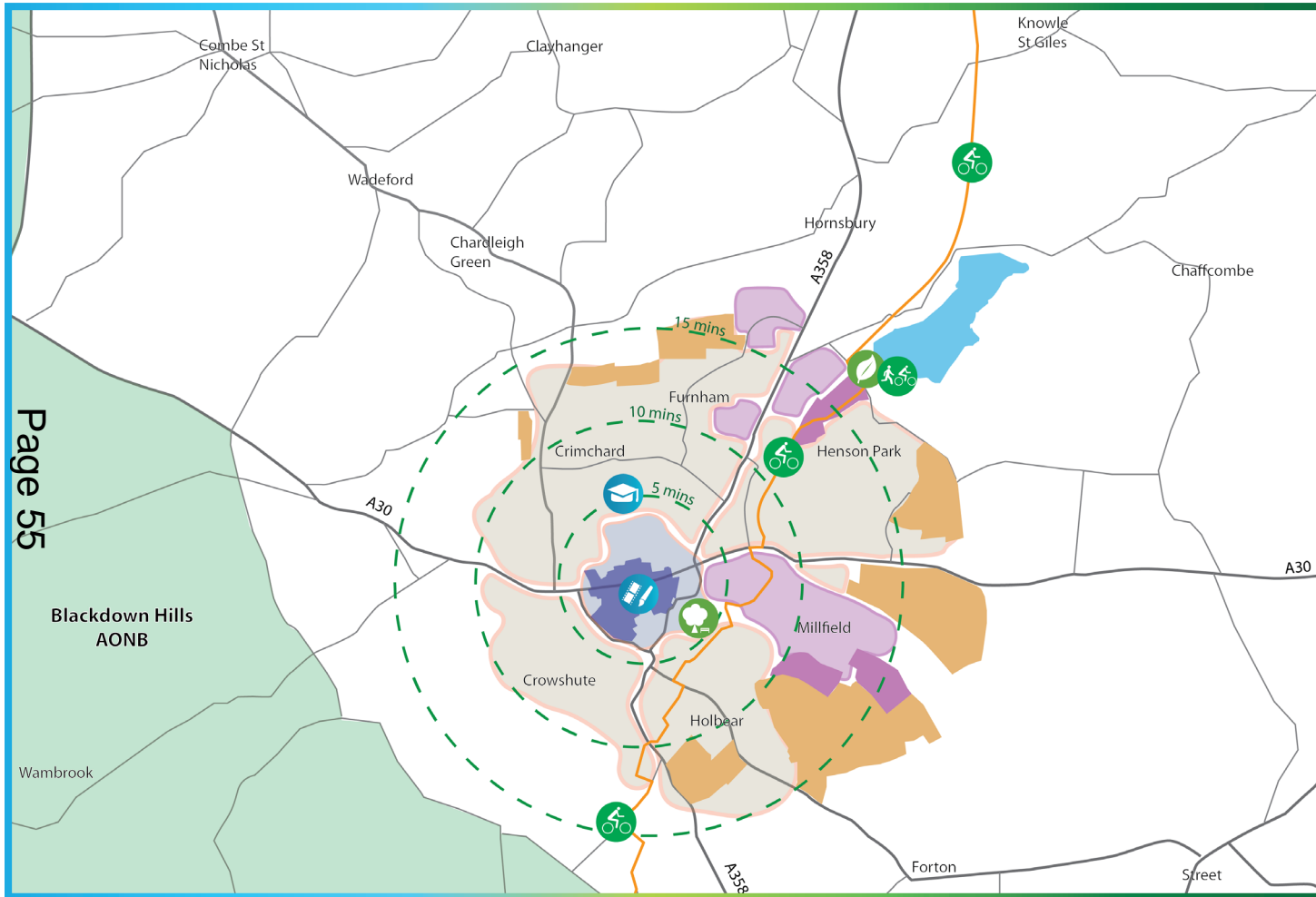
## Reflecting on Chard's Potential

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



Page 55

Blackdown Hills AONB

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 and industry, such as 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, as well as lack of community-owned space, 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 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.



## Opportunities



People

- 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, including local artisan trades.

- 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.
  - Negative impact of redundant mill sites.

## 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: Make it in Chard – New Identity**

**Crosscutting Theme: New Way of Working**

**Priority Theme: Economy**

**Priority Theme: Community, Health & Wellbeing**

**Priority Theme: Town Centre Destination**

**Priority Theme: 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.

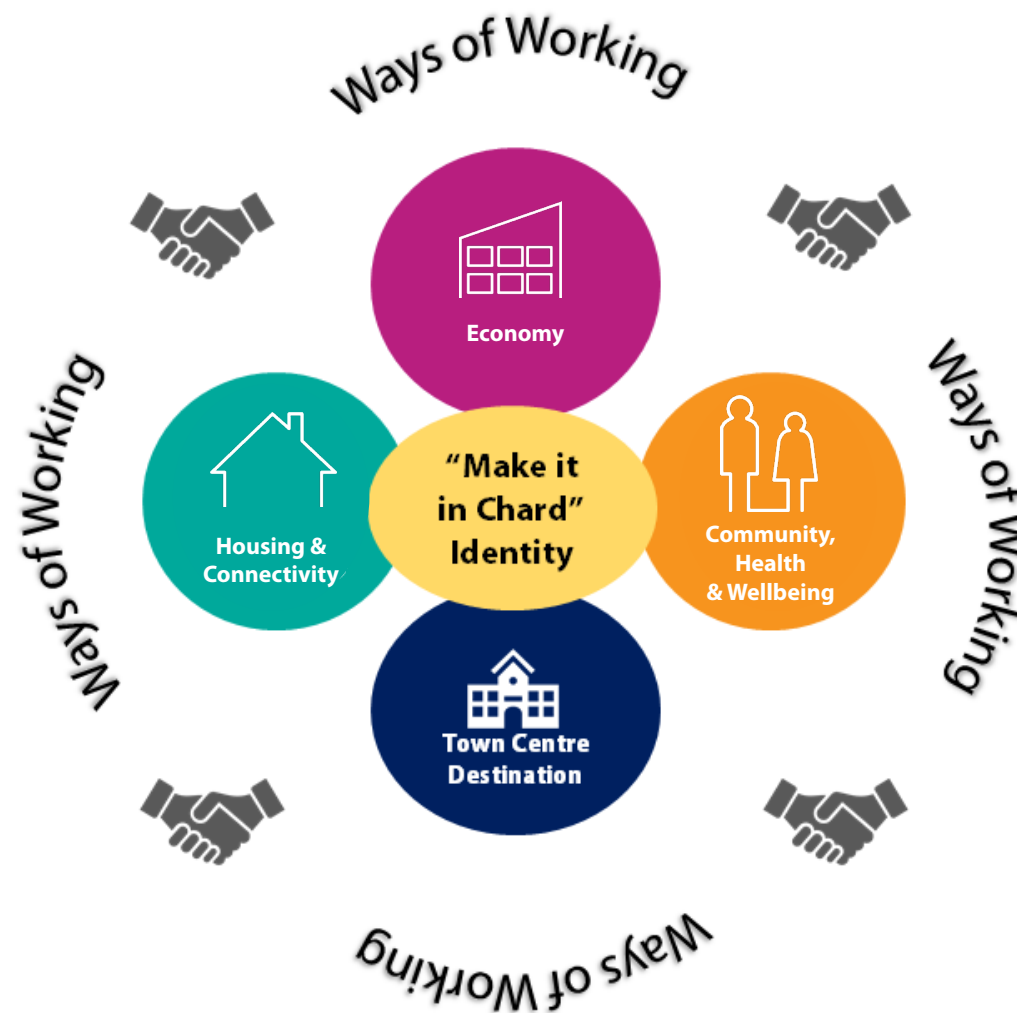


Figure 6: Priority Themes for Intervention

## Cross Cutting Theme: 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.

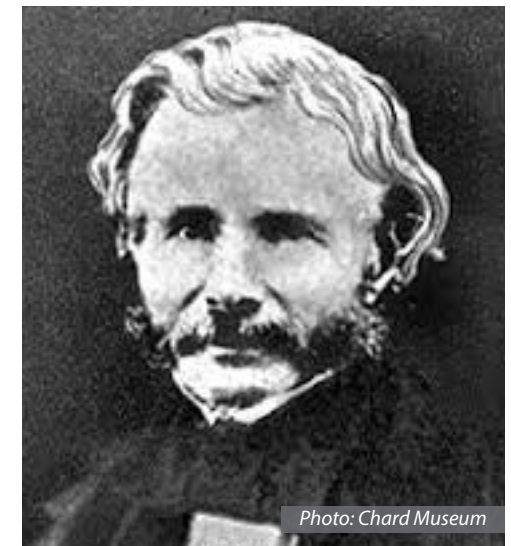
The principle of the 'Make it in Chard' campaign was first promoted in the 2010 Regeneration Vision as an idea encapsulating making your life in the town, and as an exhortation to businesses to invest and develop. This still rings true for Chard today.

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.

Page 61

## 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.



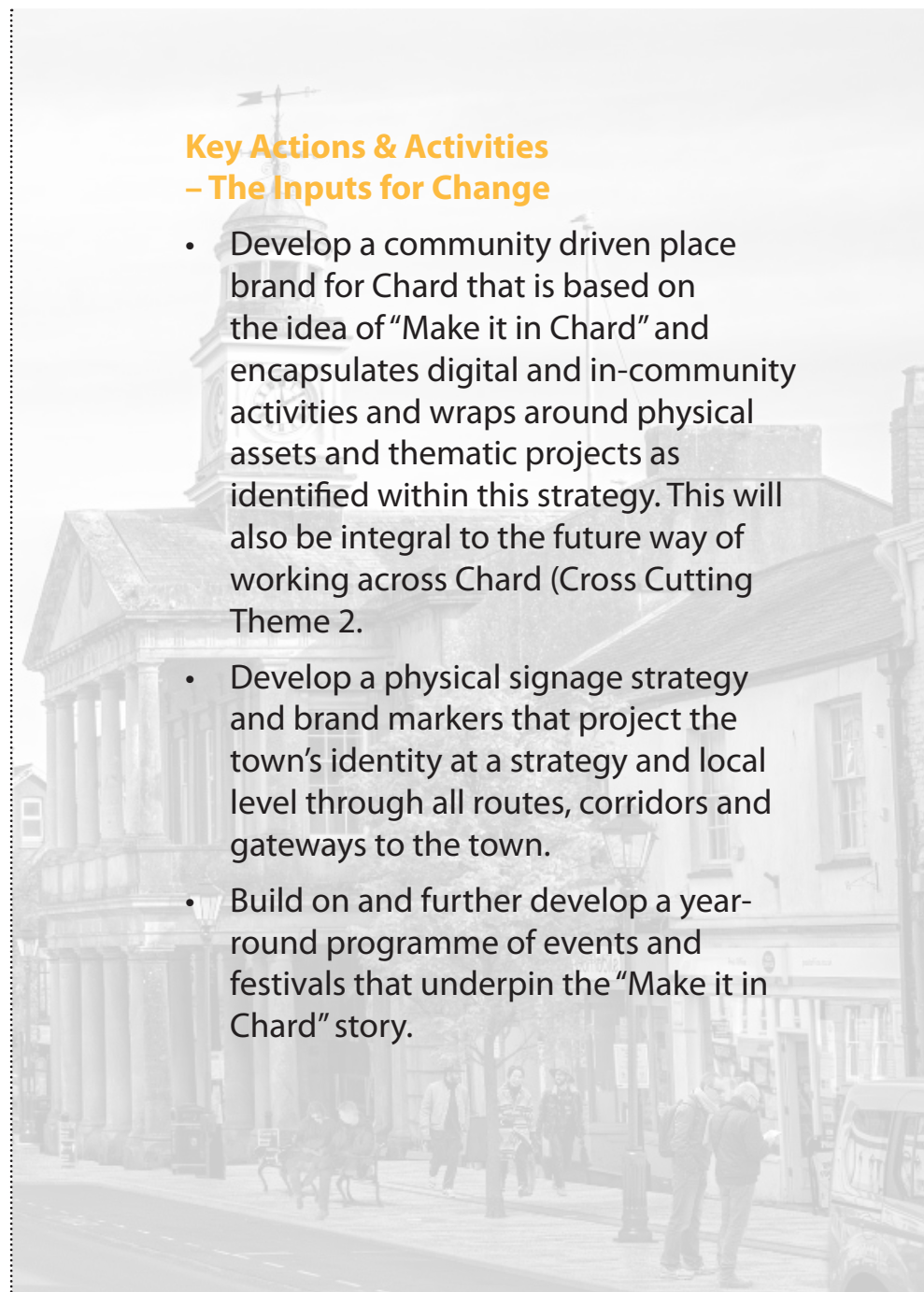
Positive feedback on changing perceptions of Chard from local residents, businesses and further afield.



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: Make it in Chard – New Identity



#### Enterprising

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



#### Caring

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.



#### Connected

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



#### Destination

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

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: 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.

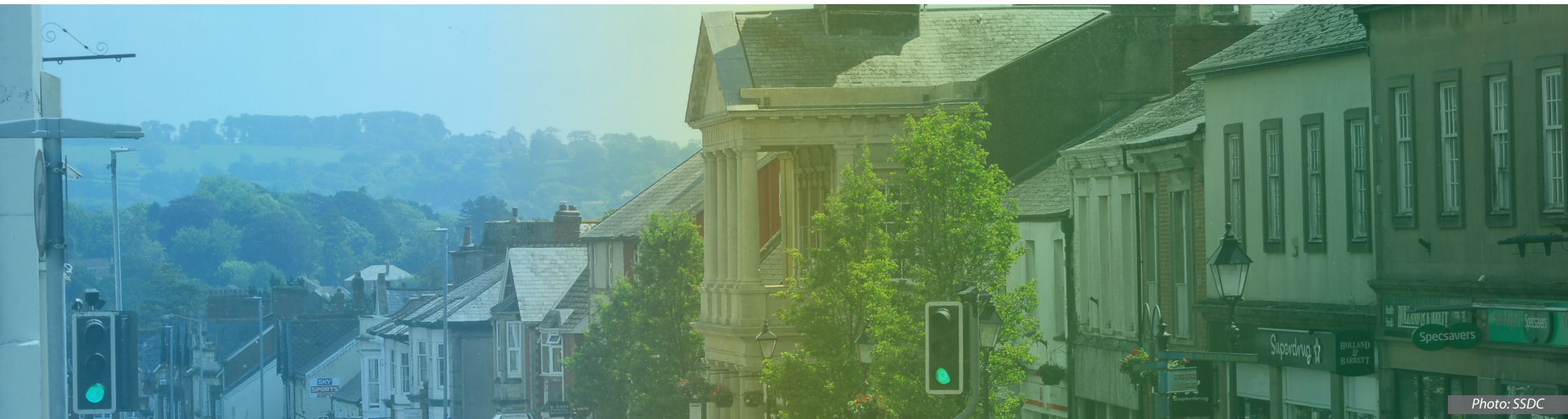


A place based resource management and delivery approach is developed.

Page 64

## 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: New Way of Working



#### Enterprising

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

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.



#### Connected

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

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

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: 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 - The 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 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.



Photo: Microsoft

### 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 and artisan 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: Economy



#### Enterprising

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

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.



#### Connected

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

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

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: 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.

Page 69



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.



## Caring – 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, reduced anti-social behaviour 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: Community, Health & Wellbeing



#### Enterprising

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



#### Caring

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



#### Connected

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

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

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



## Priority Theme: 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 - The 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 - The Outputs



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 with strong linked or complementary activity, integrated business opportunities, clear physical linkages and joint marketing of town centre activities
- Test the potential for a community hub building including facilities for younger and older members of the community.
- 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 reduced traffic congestion, 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.
- Address the redundant mill sites when external funding becomes available.

## Contribution to the Chard Vision:

### Priority Theme: Town Centre Destination



#### Enterprising

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

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.



#### Connected

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

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

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: 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 – 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 and open countryside.

## Key Measures - The Outputs



Page 77

Delivery of planned new housing and infrastructure across Chard by the development industry, in line with the Local Plan, to include flood mitigation.



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.
- Bring partners together to understand and address flooding issues.
- 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.
- 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. Eg, 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, local e-commerce and carbon-neutral last-mile delivery service.



## Contribution to the Chard Vision:

### Priority Theme: Housing Connectivity



#### Enterprising

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

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.



#### Connected

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

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

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.



Image: Element Urbanism



Image: AHR Architects

## 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	
<b>Cross Cutting Theme: Identity</b>										
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									
<b>Cross Cutting Theme: New Way of Working</b>										
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									
<b>Priority Theme: Economy</b>										
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 - linked to TC2									
E3	Develop a Chard Business Network - linked to TC2									
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	
<b>Priority Theme: Community, Health &amp; Wellbeing</b>										
CHW1	Provide adult learning opportunities in Chard - central digital hub provision - - linked to CHW5, E2a/b and TC2									
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, E2a and TC2									
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									
<b>Priority Theme: Town Centre Destination</b>										
TC1	Maximise benefits of the Leisure Centre in the town centre - signage/marketing/public realm and leisure/wellbeing cluster									
TC2	Test the potential for a community hub building including facilities for younger and older members of the community - linked to E2a/b, E3, CHW1, CHW5									
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									

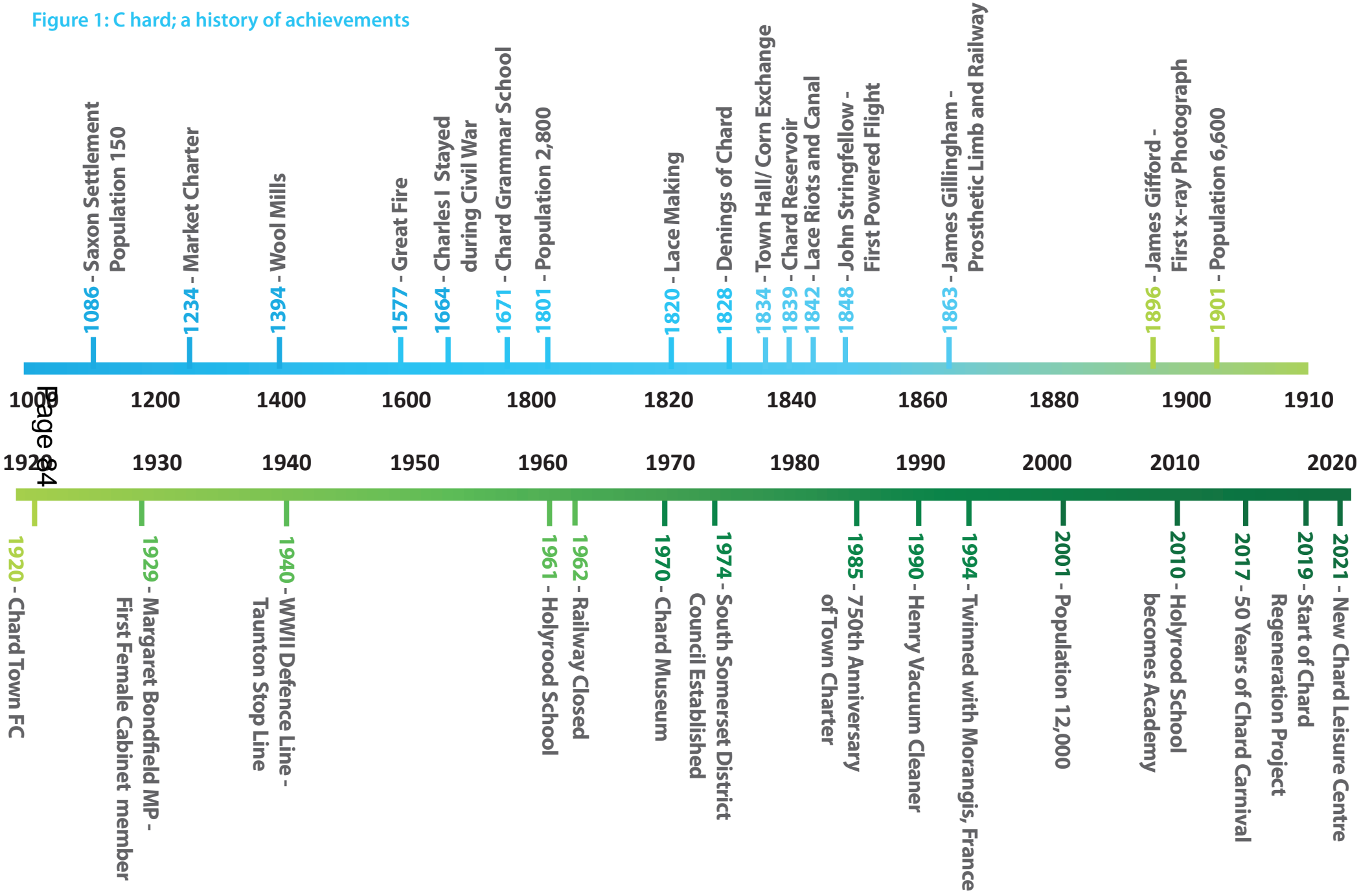
Chard Future Strategy 2021-2035 - Action Plan Framework		Programme			Vision & Outcomes				
		2021 - 23	2023 - 28	2028 - 35	Enterprising	Caring	Connected	Destination	Sustainable
<b>Priority Theme: Town Centre Destination</b>									
TC6	Provide a retail mentoring scheme to support local traders	●	○	○	●	●	●	●	○
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	Develop stronger town centre walking circuit - connecting key assets and destinations	●	○	○	●	●	●	●	●
TC12	Address the redundant mill sites when external funding becomes available	●	●	○	●	●	●	●	●
<b>Priority Theme: Housing &amp; Connectivity</b>									
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	●	○	○	○	●	●	●	●
HC8	Bring partners together to understand and address flooding issues.	●	●	●	○	●	●	○	●

# Figures

Page 83



Figure 1: Chard; a history of achievements



Page 94

Figure 2: Chard Strategic Location

Source: based on Ordnance Survey data under SSDC Licence agreement



Figure 3: Chard Vision and Strategic Outcomes

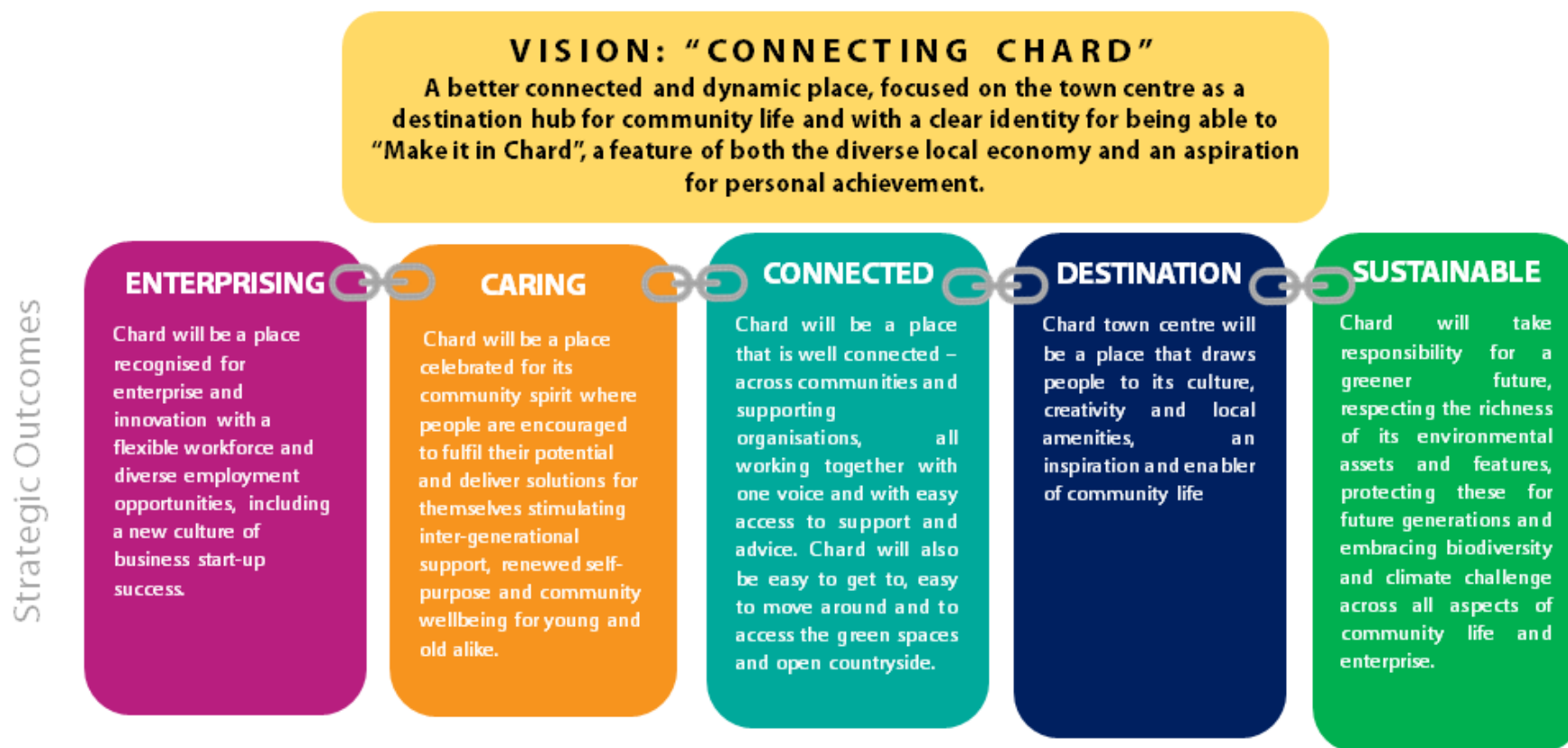
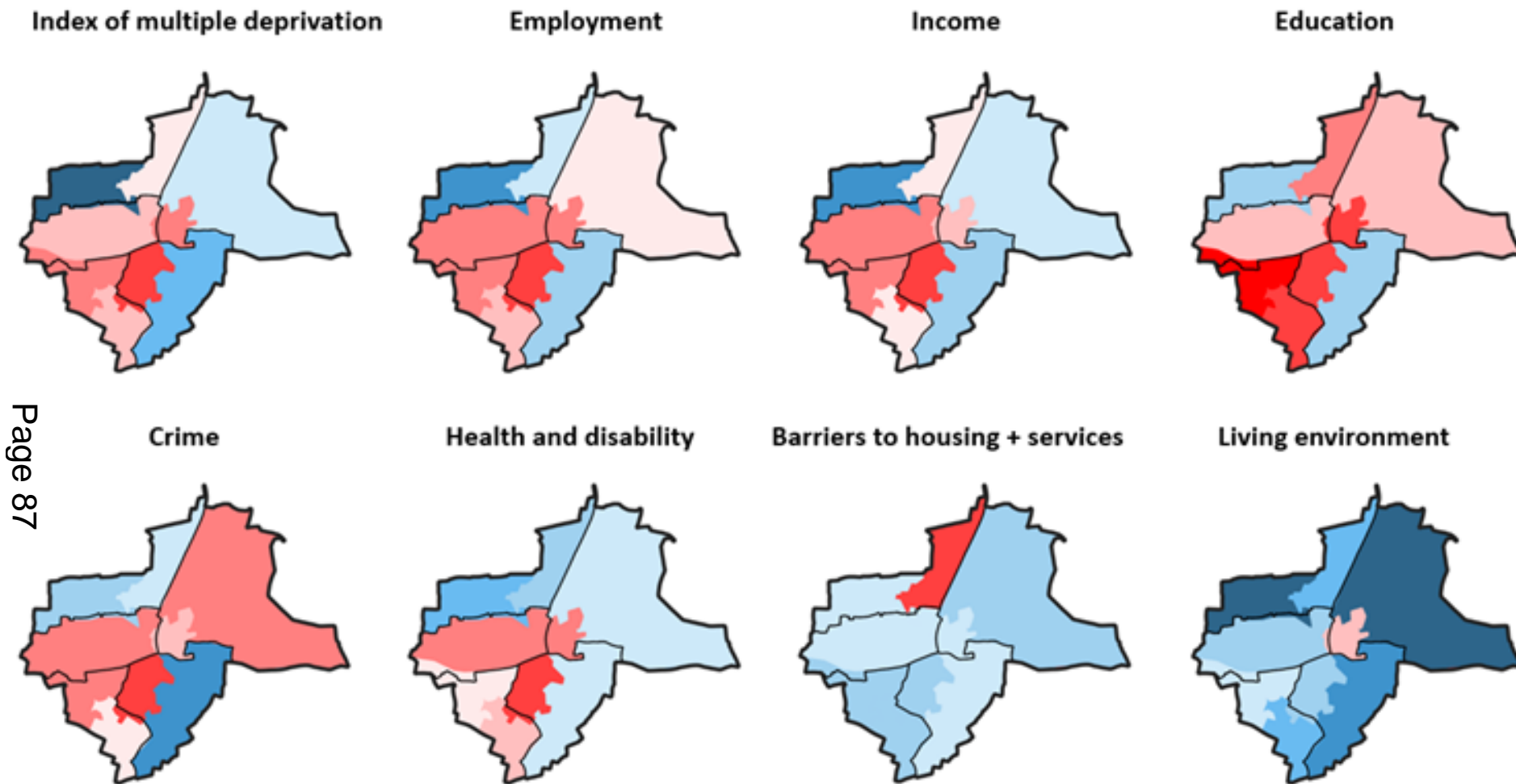


Figure 4: Chard: Indices of Deprivation 2019



Page 87

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

Page 88

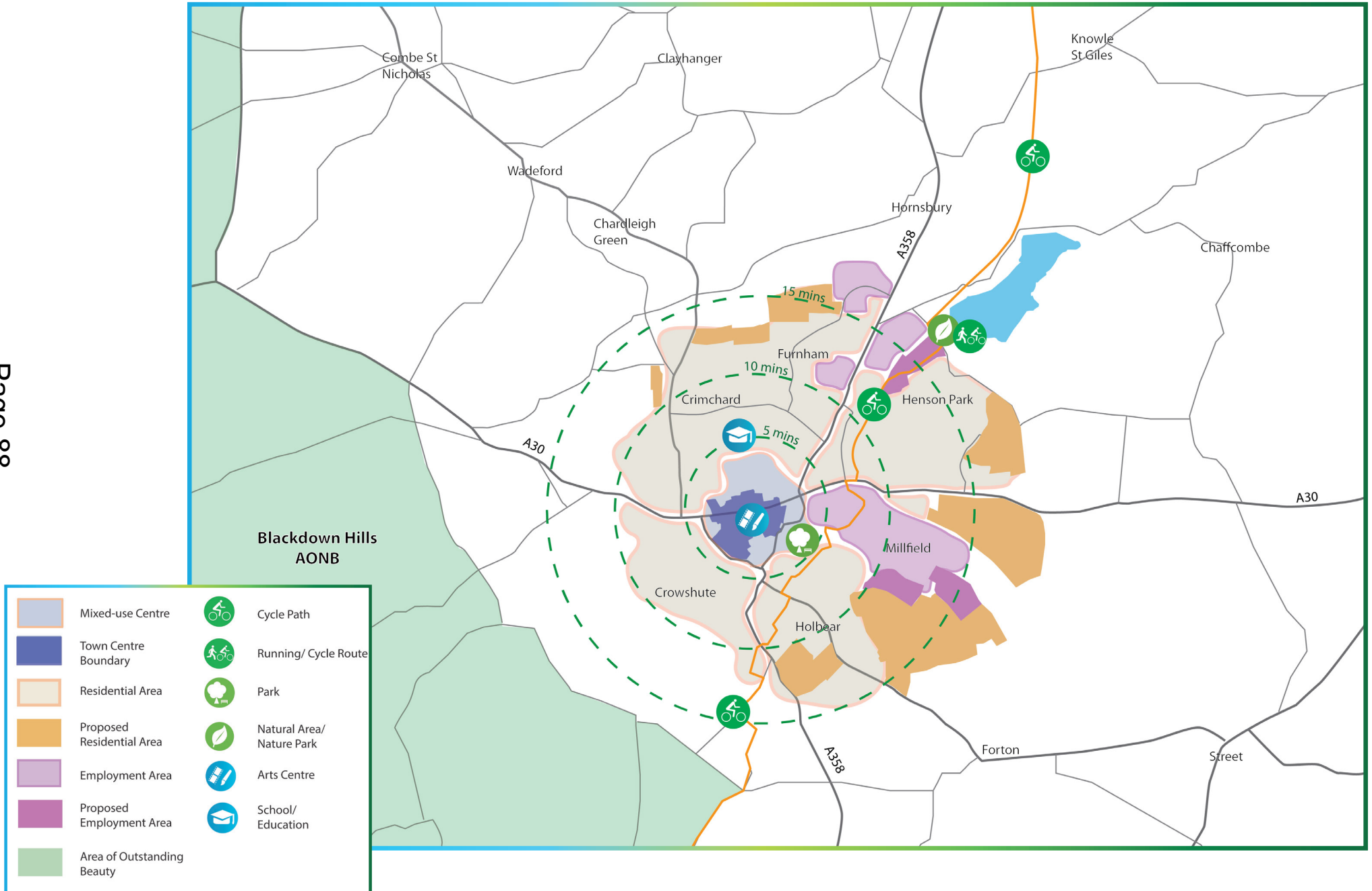




Figure 6: Priority Themes for Intervention





# Future Chard Strategy

Actions & Initiatives Framework 2021 - 2035



## Cross Cutting Theme: 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	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>I1</b> - 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"> <li>Development of a Chard Business Network</li> <li>Rural business cluster promotion</li> <li>Potential hub building</li> <li>Youth achievement awards</li> <li>Meanwhile and pop-up projects</li> <li>Markets and event programme</li> <li>Evening time economy activity</li> </ul>	<ul style="list-style-type: none"> <li>Chard Regeneration Plan 2010</li> <li>Chard Future Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Proposed Business Network</li> <li>Chard Town Council</li> <li>Chard Connect</li> </ul>	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><b>I2</b> - 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"> <li>Chard Town Centre Public Realm Strategy</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Proposed Business Network</li> <li>Chard Town Council</li> <li>Chard Connect</li> </ul>	Chard presents strong first impressions to visitors through an identity that is coherent and distinctive.			
<p><b>I3</b> - 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"> <li>Culturally Chard</li> <li>High Street Heritage Action Zone (HSHAZ) Cultural Programme</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Proposed Business Network</li> <li>Chard Town Council</li> <li>Chard Connect</li> </ul>	Chard events have a reputation of being community grown, rooted in its place and the warmest of welcomes.			



## Cross Cutting Theme: 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	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>WoW1</b> - 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"> <li>Proposed business network</li> <li>Chard Churches Together</li> <li>Youth Council</li> </ul> <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"> <li>Future Chard Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Chard Connect and respective organisations</li> </ul>	Chard has visible and cross community leadership amongst organisations through an accessible, transparent and action-based Forum.			
<p><b>WoW2</b> - 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"> <li>Future Chard Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Chard Connect and respective organisations</li> </ul>	Town organisations are skilled, confident, and empowered to work in an integrated way.			
<p><b>WoW3</b> - 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"> <li>Future Chard Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>Chard Town Council</li> <li>Chard Youth Centre</li> <li>Local schools</li> <li>Chard Connect and respective organisations</li> </ul>	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><b>WoW4</b> - 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"> <li>Future Chard Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>Chard Connect</li> <li>Chard Town Council</li> </ul>	Open access to information makes Chard an informed and coordinated place for community action and services.			
<p><b>WoW5</b> - Explore opportunities for joint service delivery that maximise budgets, smarter procurement and value for money.</p>	<ul style="list-style-type: none"> <li>Future Chard Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Other strategic and local agencies</li> </ul>	Local services are delivered in Chard through smart procurement and service delivery ensuring public money is spent effectively.			

Page 92



## Priority Theme: 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

Page 298

Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<b>E1</b> - 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.	<ul style="list-style-type: none"> <li>South Somerset District Council Economic Strategy 2019</li> <li>Somerset Growth &amp; Recovery Plan 2021</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Somerset CC</li> <li>DWP</li> <li>Job Centre + CAS</li> </ul>	Minimise impact and disruption to local labour market and individual families' income and prosperity. Reduce social and economic cost of unemployment and benefit dependency.			
<b>E2</b> - <b>A)</b> 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>B)</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.	<ul style="list-style-type: none"> <li>South Somerset District Council Economic Strategy 2019</li> <li>Somerset Growth &amp; Recovery Plan 2021</li> <li>Community Renewal Fund</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Somerset CC</li> <li>DWP</li> <li>Job Centre + CAS</li> </ul>	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.			
<b>E3</b> - 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.	<ul style="list-style-type: none"> <li>Chard Regeneration Plan 2010</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Local businesses</li> </ul>	A stronger voice for local businesses focussed on business needs.			
<b>E4</b> - 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.	<ul style="list-style-type: none"> <li>Chard Future Strategy 2021</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Somerset CC</li> <li>Holyrood Academy</li> <li>Employer cluster</li> </ul>	Young people are inspired and motivated to explore an entrepreneurial pathway leading to increase in start ups and young ambassadors.			



Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>E5</b> - 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"> <li>• South Somerset DC Economic Strategy 2019</li> <li>• SSDC Corporate Plan</li> <li>• Builds on Action 4 above</li> <li>• Made in Chard</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> </ul>	Long term stimulation of social mobility through motivation and recognition of potential making business enterprise a realistic prospect.			
<p><b>E6</b> - 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"> <li>• South Somerset Economic Development Strategy 2019</li> <li>• Rural Development Plan 2017-2020</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Rural business cluster</li> <li>• Proposed Business Network</li> </ul>	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><b>E7</b> - 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"> <li>• South Somerset DC Economic Development Strategy 2019</li> <li>• Somerset Growth &amp; Recovery Plan 2021</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> </ul>	Managed and supported high quality business space for new and growing SMEs providing a dynamic business network with intense business support.			
<p><b>E8</b> - 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"> <li>• Work Hub Feasibility Study 2021</li> <li>• Builds on Actions E2 E4, E5 &amp; E6 above</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> <li>• DWP</li> <li>• Job Centre +</li> <li>• FE</li> <li>• Holyrood Academy</li> <li>• Proposed Business Network</li> </ul>	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><b>E9</b> - 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"> <li>• Post 16 Strategy and Plan</li> <li>• High Street Heritage Action Zone</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> <li>• Holyrood Academy</li> <li>• Chard Youth Centre</li> </ul>	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.			

Page 94



## Priority Theme: 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	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<b>CHW1</b> - 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"> <li>Linked to Economy and Employment Skills Hub Activity E2 and E8</li> </ul>	<ul style="list-style-type: none"> <li>Holyrood Academy</li> <li>Yeovil College</li> </ul>	Wider choice of vocational training and access to locally delivered adult learning.			
<b>CHW2</b> - Explore emerging insights and good practice locally with Abri to extend similar engagement and community support throughout Chard.	<ul style="list-style-type: none"> <li>South Somerset DC Corporate Plan</li> <li>Abri Community Investment Plan</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Abri RSL</li> </ul>	Extended whole community engagement providing greater access to support and encouragement to achieve.			
<b>CHW3</b> - 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"> <li>South Somerset DC Corporate Plan</li> <li>HotSW LEP Build Back Better</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>HotSW LEP</li> </ul>	Targeted local support and stimulus to break the cycle of poverty and underachievement.			
<b>CHW4</b> - 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"> <li>Linked to Cross Cutting theme of Ways of Working and Place Leadership</li> </ul>	<ul style="list-style-type: none"> <li>Local Partnership</li> <li>Chard Youth Centre</li> <li>Town Council</li> <li>Holyrood Academy</li> </ul>	Young people feel valued within the community, being recognised as positive role models in community life.			
<b>CHW5</b> - Consider formation of local digital training hub – aligned with employment advice and integrated service access points.	<ul style="list-style-type: none"> <li>Widening access to</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Holyrood Academy</li> <li>Yeovil College</li> </ul>	Widen local access to vocational and adult training as well as academic routes.			
<b>CHW6</b> - 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"> <li>South Somerset Local Plan Review</li> <li>South Somerset Leisure Facilities Strategy 2019</li> <li>South Somerset Playing Pitch Strategy 2017</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Sports and recreational organisations</li> </ul>	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	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<b>CHW7</b> - 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"> <li>South Somerset Environment Strategy 2019</li> <li>Somerset wide Climate Emergency Strategy</li> <li>Active Travel Route Assessment</li> <li>Chard Transport and Movement Appraisal (2019)</li> <li>Spark Somerset/ Primary Care Network projects</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Somerset CC</li> <li>Spark Somerset</li> </ul>	More people are more active and able to chose safer walking and cycling routes into and around Chard.			
<b>CHW8</b> - Encourage healthy eating through links to local agriculture and opportunities for community growing.	<ul style="list-style-type: none"> <li>Somerset wide Climate Emergency Strategy</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Spark Somerset</li> <li>Chard Connect</li> <li>Abri RSL</li> </ul>	Community routes also become growing and living corridors with improved awareness, well-being, civic pride and activity levels across all ages and social groupings.			
<b>CHW9</b> - 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"> <li>Spark Somerset/ Primary Care Network projects</li> <li>Abri Community Investment Plan</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Spark Somerset</li> <li>Chard Connect</li> <li>Abri RSL</li> <li>Chard Town Council</li> </ul>	Residents across Chard have enhanced mental and physical health and well-being, leading to greater happiness and satisfaction levels.			
<b>CHW10</b> - 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"> <li>South Somerset DC Local Plan growth objectives</li> </ul>	<ul style="list-style-type: none"> <li>Somerset NHS Foundation Trust</li> </ul>	Easy community access to health support and advice – centrally located contributing to the town centre vitality.			
<b>CHW11</b> - 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"> <li>South Somerset DC Local Plan growth objectives</li> </ul>	<ul style="list-style-type: none"> <li>Somerset NHS Foundation Trust</li> </ul>	Continued access to locally based health services meeting the needs of the expanding population.			





## Priority Theme: 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.

Photo: SSDC

Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>TC1</b> - 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> <p>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"> <li>South Somerset DC Council Plan</li> <li>Chard Regeneration Plan (2010)</li> <li>High Street Heritage Action Zone (HSHAZ)</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Proposed business network</li> <li>Primary care network</li> <li>Other town organisations</li> </ul>	<p>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> <p>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>			
<p><b>TC2</b> - 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"> <li>The Boden Centre</li> <li>The Lace Mill building</li> <li>Land alongside Crowshute Centre</li> <li>Land to rear of Town Museum</li> </ul> <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"> <li>Work Hub Feasibility Study 2021</li> <li>Links with Priority Aims E2 and E8 above</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Chard Connect</li> <li>Spark</li> </ul>	<p>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>			



Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>TC3</b> - 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.</p> <p>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"> <li>Links with Priority E3 above</li> <li>Chard Regeneration Plan (2010)</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Chard Connect</li> <li>Shadow business network partnership</li> </ul>	<p>“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>			
<p><b>TC4</b> - 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"> <li>Eastern gateway improvements</li> <li>The Guildhall area</li> <li>Holyrood Street</li> <li>Other complementary Heritage Action Zone initiatives</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC Council Plan</li> <li>Chard Regeneration Plan (2010)</li> <li>Chard Town Centre Public Realm Strategy (2019)</li> <li>HSHAZ</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> </ul>	<p>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.</p>			
<p><b>TC5</b> - 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"> <li>Chard Town Centre Public Realm Strategy (2019)</li> <li>HSHAZ</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Chard Connect</li> <li>Young Somerset Project (Somerset CC)</li> <li>Abri RSL</li> </ul>	<p>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>			
<p><b>TC6</b> - 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"> <li>South Somerset DC Economic Strategy 2019</li> <li>HSHAZ</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Proposed business network</li> </ul>	<p>Chard businesses work to a quality mark that is consistent and projects a warm welcome, quality products and services.</p>			
<p><b>TC7</b> - 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"> <li>Chard Town Council management/activity plan</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Chard Town Council</li> <li>Chard Connect</li> <li>Chard Carnival and other town organisations</li> </ul>	<p>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>			



Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>TC8</b> - 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"> <li>• Pop up cinema/theatre/mic nights</li> <li>• Night markets</li> <li>• Supper clubs</li> <li>• Food producer/taster events</li> <li>• Heritage trails by night</li> <li>• Arts/crafts – make a lantern</li> </ul> <p>Where required improvements in street lighting and other measures will be introduced.</p>	<ul style="list-style-type: none"> <li>• Culturally Chard HSHAZ Cultural Programme</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Chard Town Council</li> <li>• Chard Connect</li> <li>• Proposed business network</li> </ul>	<p>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.</p>			
<p><b>TC9</b> - 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"> <li>• Chard Regeneration Plan (2010)</li> <li>• Chard Town Centre Public Realm Strategy (2019)</li> <li>• HSHAZ</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Chard Town Council</li> <li>• Somerset CC</li> </ul>	<p>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>			
<p><b>TC10</b> - 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"> <li>• increase off-street parking</li> <li>• management of on-street parking to increase footways and public space</li> <li>• disabled parking provision</li> <li>• signage improvements</li> <li>• junction improvements</li> <li>• charging strategies and payment methods</li> <li>• electric vehicle charging and coach parking</li> </ul>	<ul style="list-style-type: none"> <li>• Chard Regeneration Plan (2010)</li> <li>• Chard Town Centre Public Realm Strategy (2019)</li> <li>• HSHAZ</li> <li>• Chard Transport and Movement Appraisal (2019)</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> </ul>	<p>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>			
<p><b>TC11</b> - 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"> <li>• Chard Regeneration Plan (2010)</li> <li>• Chard Transport and Movement Appraisal (2019)</li> <li>• Chard Town Centre Public Realm Strategy (2019)</li> <li>• HSHAZ</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Chard Town Council</li> <li>• Respective recreation and sports organisations</li> </ul>	<p>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.</p>			

Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>TC12</b> - Address the redundant mill sites when external funding becomes available. Continue to explore funding opportunities that would lead to the delivery of solutions for these key town centre sites.</p>	<ul style="list-style-type: none"> <li>Chard Regeneration Plan (2010)</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> </ul>	<p>The town centre is regenerated with its heritage at its heart, delivered in a way that is affordable to the public purse.</p>			

## Priority Theme: Housing & Connectivity



Page 100

**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.

Photo: Roberts Limbrick

Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>HC1</b> - 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"> <li>Active Travel Route Assessment</li> <li>Chard Transport and Movement Appraisal 2019</li> <li>Links to Priority Theme 4</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Somerset CC</li> </ul>	<p>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>			
<p><b>HC2</b> - 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"> <li>Chard Regeneration Plan (2010)</li> <li>Active Travel Route Assessment</li> <li>Chard Transport and Movement Appraisal (2019)</li> </ul>	<ul style="list-style-type: none"> <li>South Somerset DC</li> <li>Somerset CC</li> </ul>	<p>A safer and more attractive environment for residents and visitors, encouraging more local walking and cycling trips, and a reduction in carbon emissions.</p>			



Project	Policy Alignment	Organisations	Outcomes	Timeline		
				Short	Medium	Long
<p><b>HC3</b> - 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"> <li>• Boden Street – Holyrood Lace Mill and Fore Street links</li> <li>• Holyrood Street/Fore Street junction</li> <li>• Crowshute Link crossing improvement</li> <li>• Fore Street crossing provision</li> <li>• Links out to Jocelyn Park/Millfield</li> </ul>	<ul style="list-style-type: none"> <li>• Chard Regeneration Plan (2010)</li> <li>• Chard Transport and Movement Appraisal (2019)</li> <li>• Somerset Active Travel Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> <li>• Sustrans</li> </ul>	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><b>HC4</b> - 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"> <li>• Sustrans NCR 33</li> <li>• Somerset Active Travel Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> <li>• Sustrans</li> </ul>	Chard is known for walking and cycling whether on long regional routes, day rides and for residents accessing their town and rural area.			
<p><b>HC5</b> - 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.</p>	<ul style="list-style-type: none"> <li>• Somerset Bus Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> <li>• Bus operators</li> </ul>	The town has strong green credentials with public transport being accessible to all, and support for electric vehicle charging at key locations.			
<p><b>HC6</b> - 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.</p>	<ul style="list-style-type: none"> <li>• Somerset Active Travel Strategy</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> <li>• Somerset CC</li> <li>• Sustrans</li> <li>• Local community organisations</li> </ul>	The town has strong green credentials embracing technology, reducing carbon miles and promoting short supply chains and deliveries.			
<p><b>HC7</b> - 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.</p>	<ul style="list-style-type: none"> <li>• South Somerset Local Plan Review</li> </ul>	<ul style="list-style-type: none"> <li>• South Somerset DC</li> </ul>	Community confidence in delivery of growth and local social and economic benefits.			
<p><b>HC8</b> - Bring partners together to understand and address flooding issues.</p>	<ul style="list-style-type: none"> <li>• South Somerset Local Plan</li> </ul>	<ul style="list-style-type: none"> <li>• Somerset CC (Lead Local Flood Authority)</li> <li>• Chard Town Council</li> <li>• South Somerset DC</li> <li>• Other environment organisations</li> <li>• Local community organisations</li> </ul>	A long-term solution is found to protect Chard from future flood events.			

It is acknowledged that, at the time of writing, South Somerset DC and Somerset CC will shortly cease to exist. As the statutory responsibilities held by these two organisations will be the remit of Somerset Council once it is established, the roles suggested for South Somerset DC and Somerset CC within this Action Plan would logically also fall to Somerset Council.





# **Future Chard Strategy**

## **Social and Economic Baseline Report Technical Document**

**11<sup>th</sup> 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.

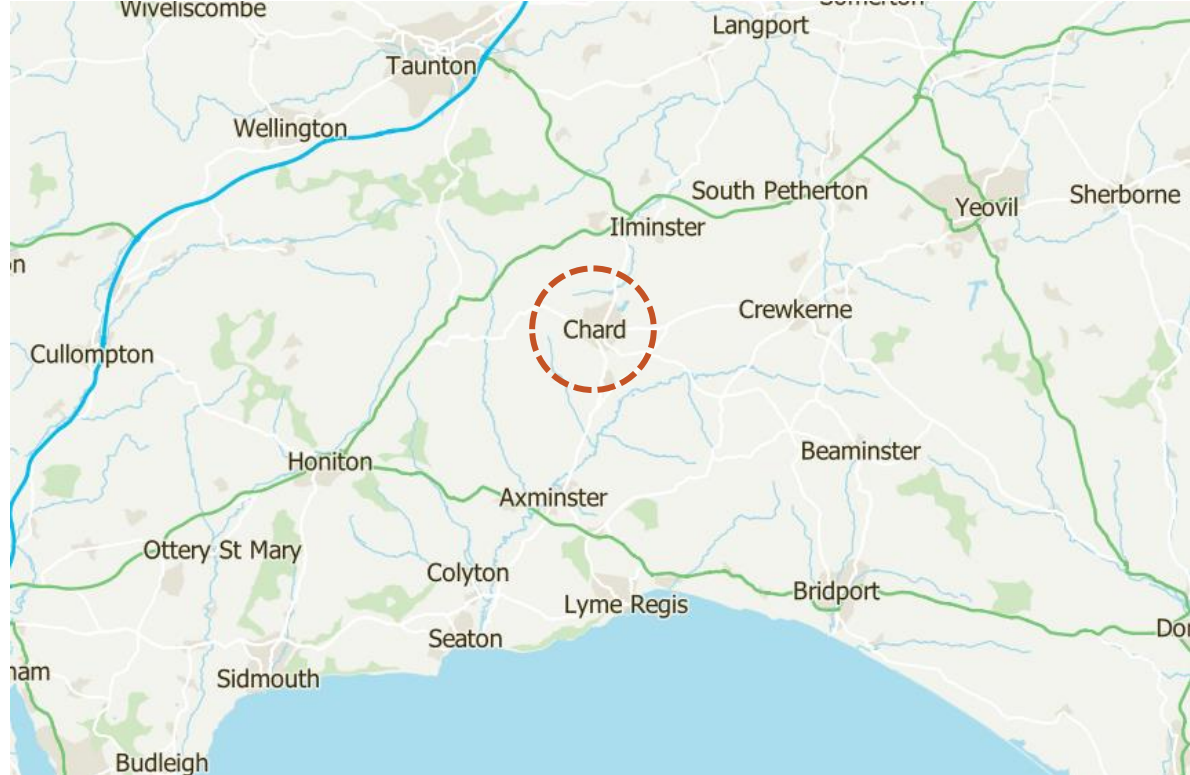


# Context Map

## Chard Local Area



## Chard Wider Context



Source: Alex Quattrone  
Contains OS data © Crown copyright and database right 2021

## 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

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

## Appendix 1 – Deprivation Maps & Description

## Appendix 2 – Chard Wards Socio-Economic Profiles

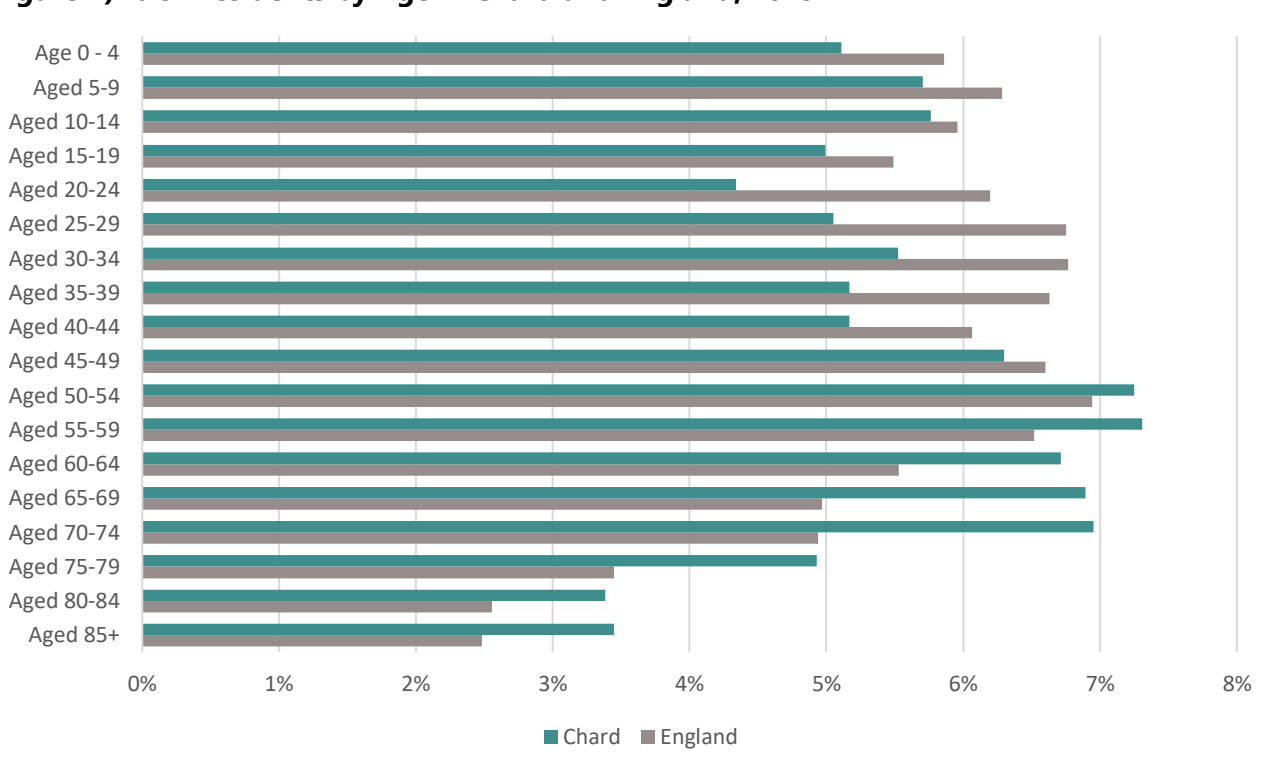
## Challenge 1: Deliver economy opportunities for a constrained labour market...

### 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**

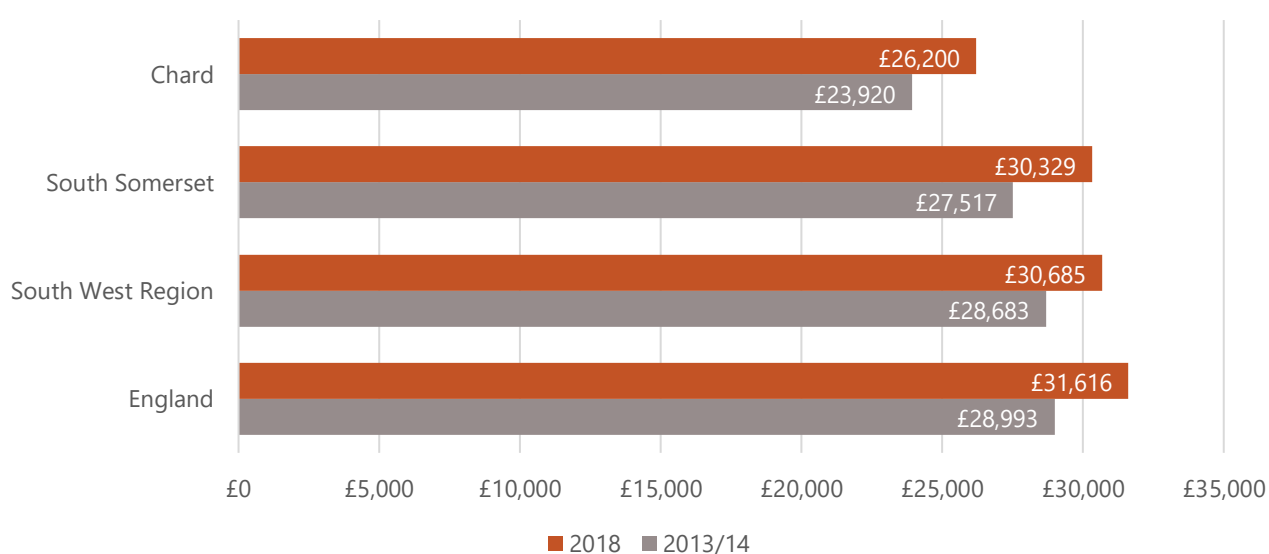
	South Somerset	Somerset	HOTSW	South West Region	England
Level 4	26%	35% ▲	37% ▲	41% ▲	43% ▲
Level 3	49%	57% ▲	60% ▲	62% ▲	61% ▲
Level 2	71%	76% ▲	78% ▲	80% ▲	78% ▲
Level 1	86%	88% ▲	90% ▲	90% ▲	88% ▲
Other qualifications	6%	6% ►	5% ▼	5% ▼	6% ►
No Qualifications	8%	7% ▼	6% ▼	5% ▼	6% ►

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.

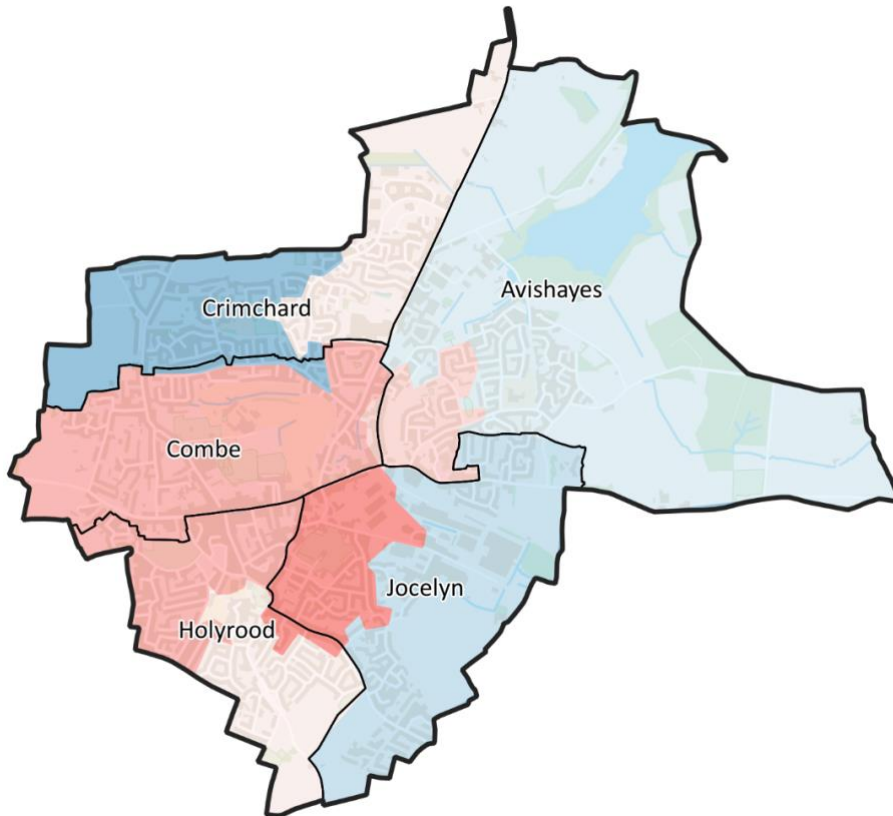
**Figure 2) Average Household Income, 2013/14 to 2018**



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.

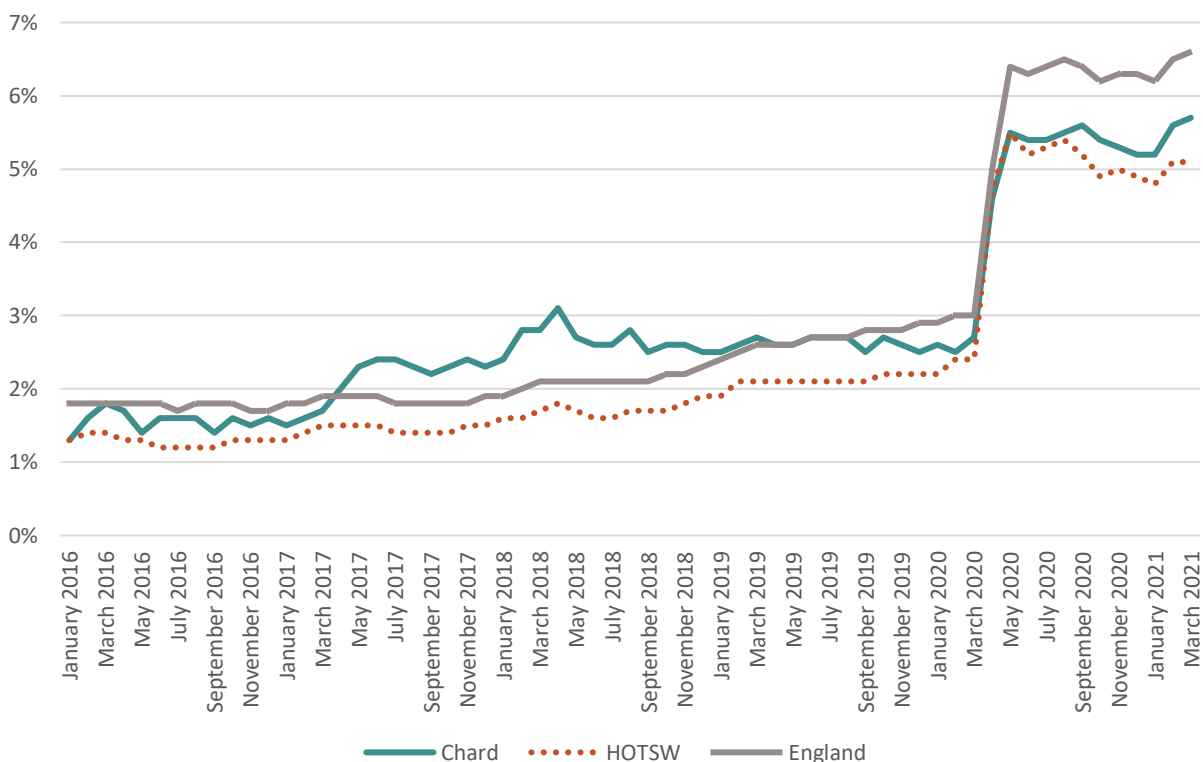
## Challenge 2: Reverse the decline in the economy...

### 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 lifting<sup>1</sup>. 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](#).

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

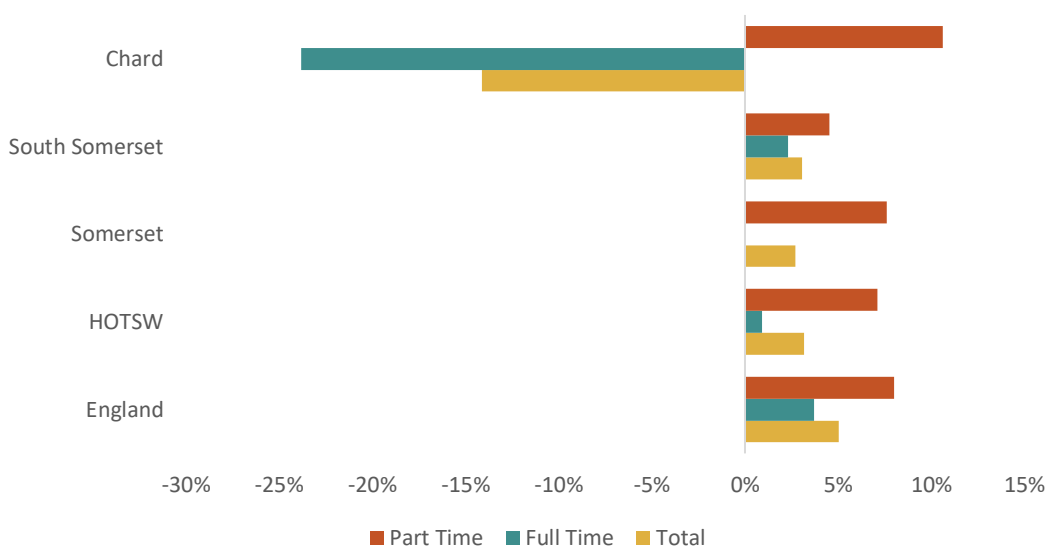
### Employment was declining pre-covid...

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**<sup>2</sup> 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.

<sup>2</sup> <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...

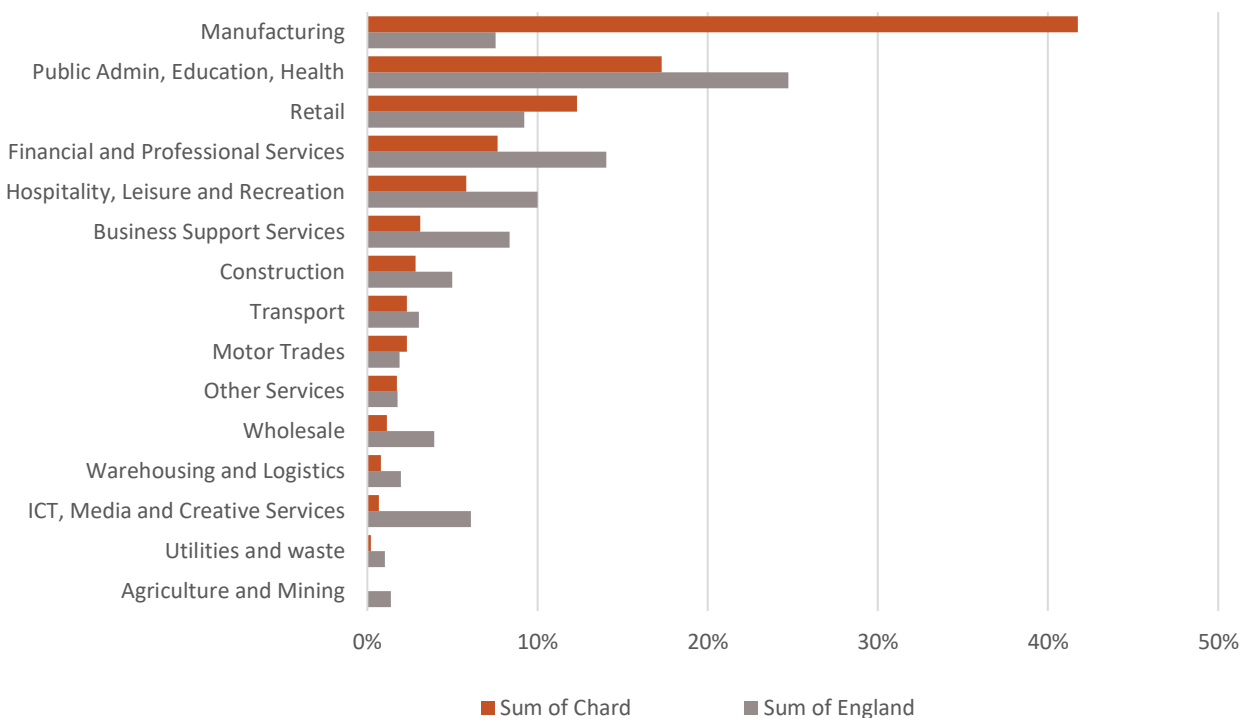
#### High dependence on manufacturing sector...

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.

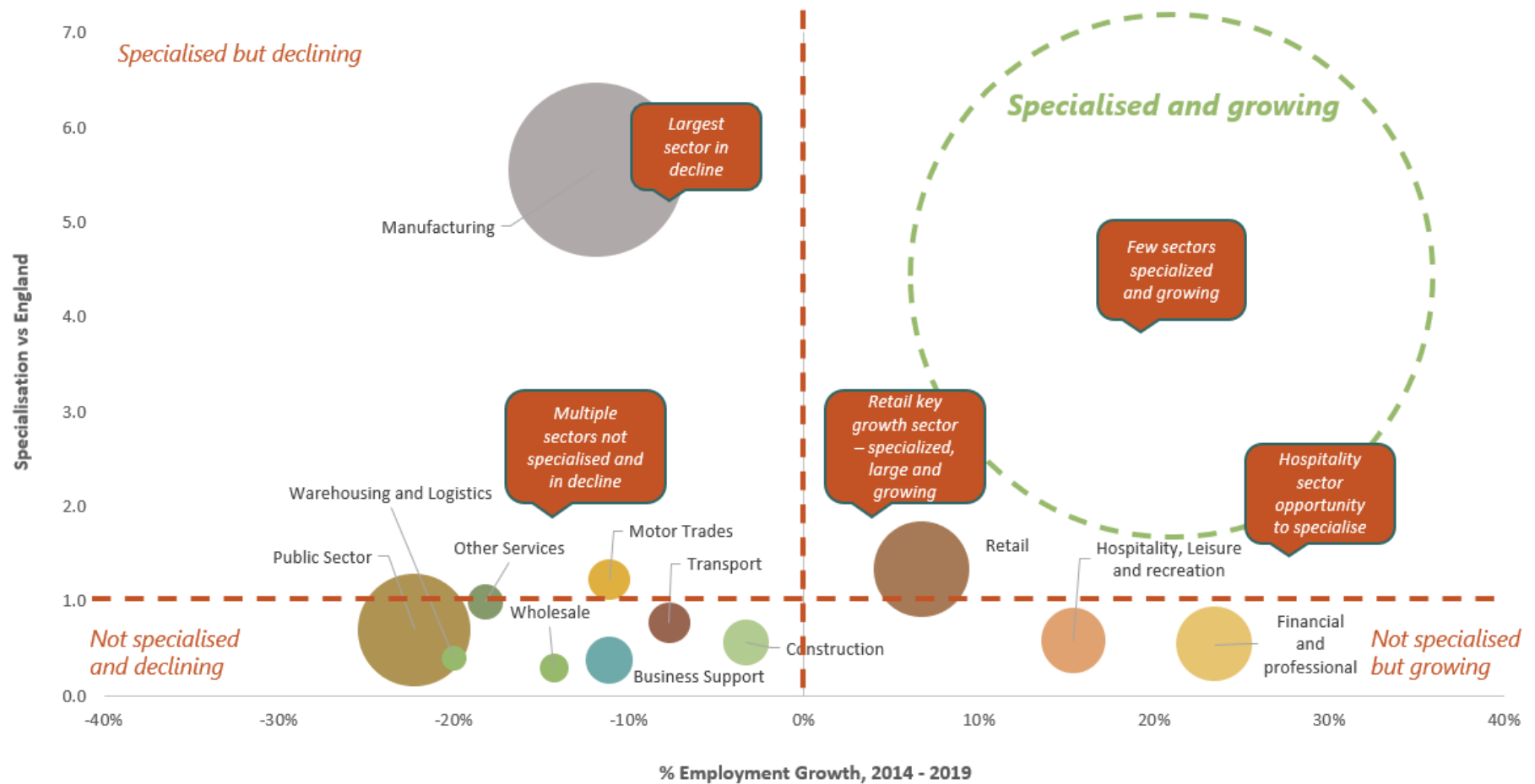
Analysis of the chart overleaf identifies a number of key trends:

- **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...

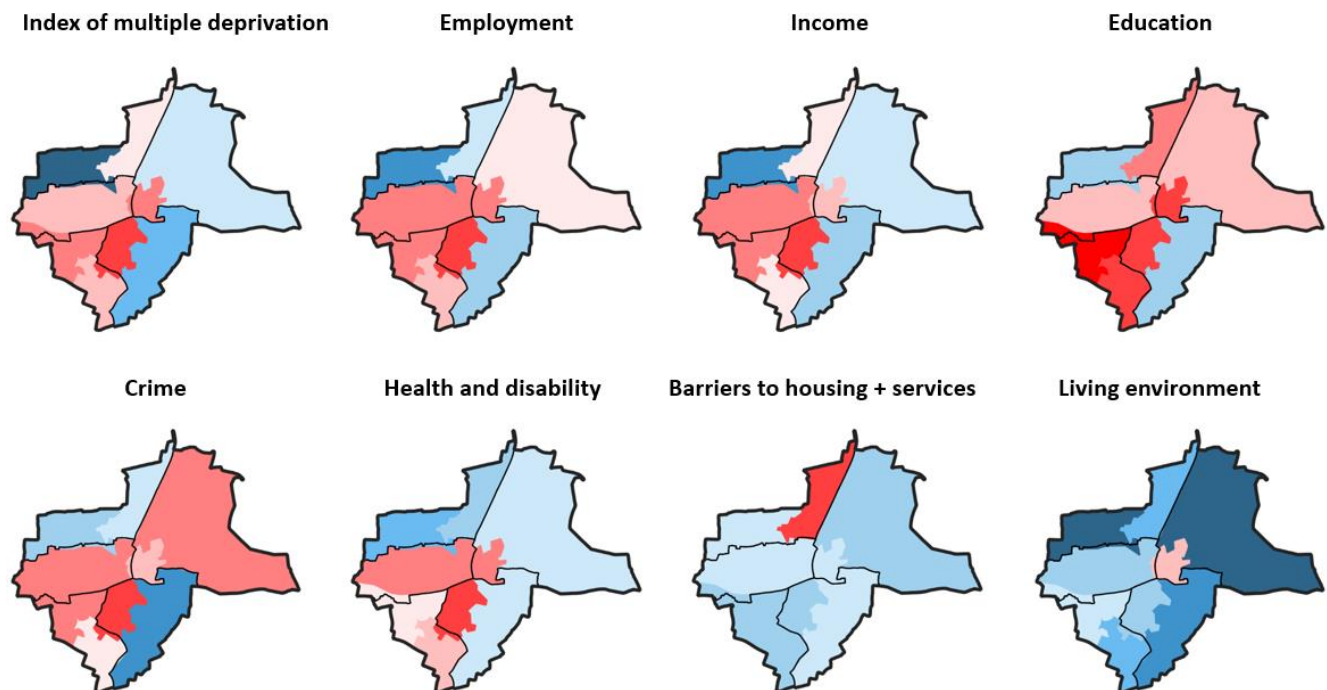
### There are serious pockets of deprivation in Chard...

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

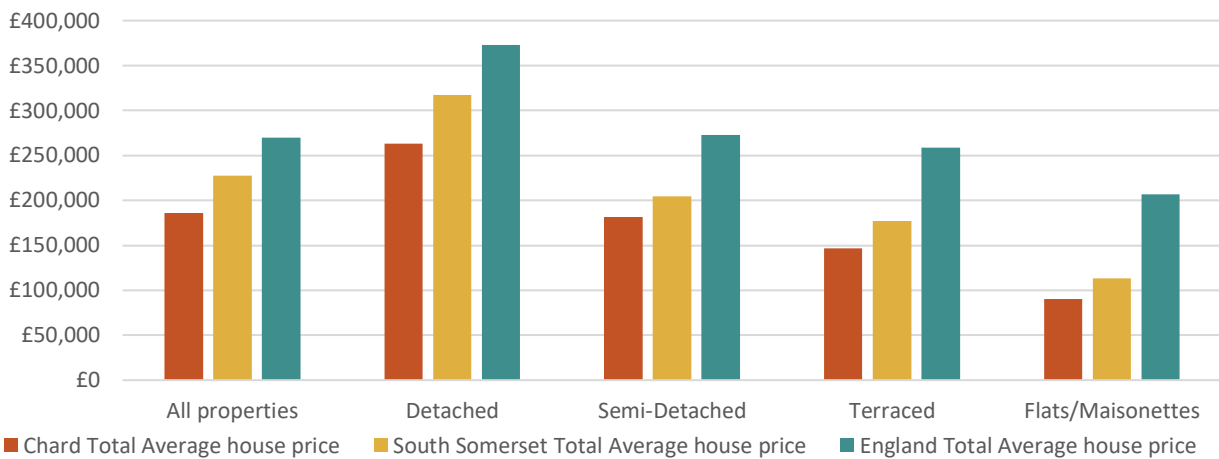
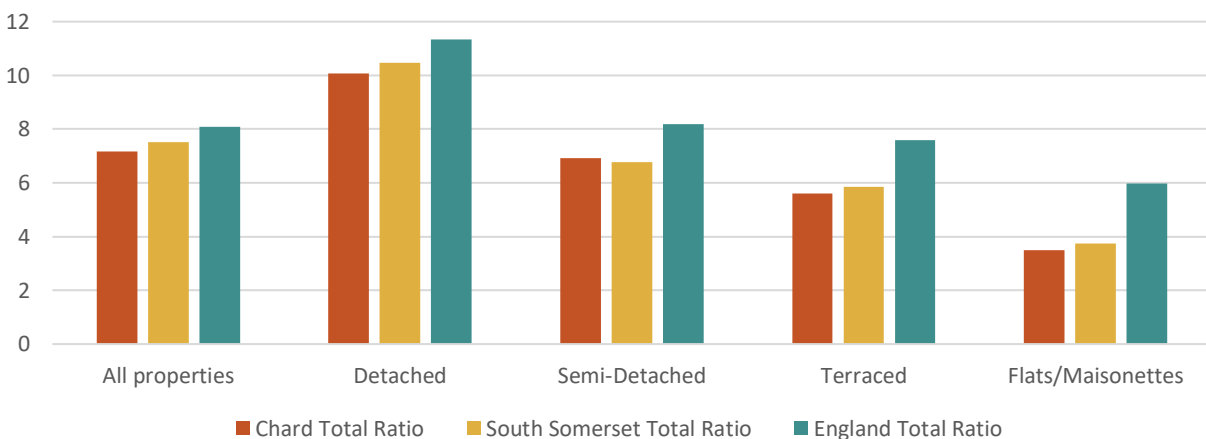


Figure 10) Ratio of Median House Price to Net Household Income, 2018



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%
<b>Totals</b>	<b>137</b>	<b>100.0 %</b>	<b>100.0 %</b>

Source: SSDC Retail Monitoring January/February 2021

**Figure 11) Town centre distribution of uses**

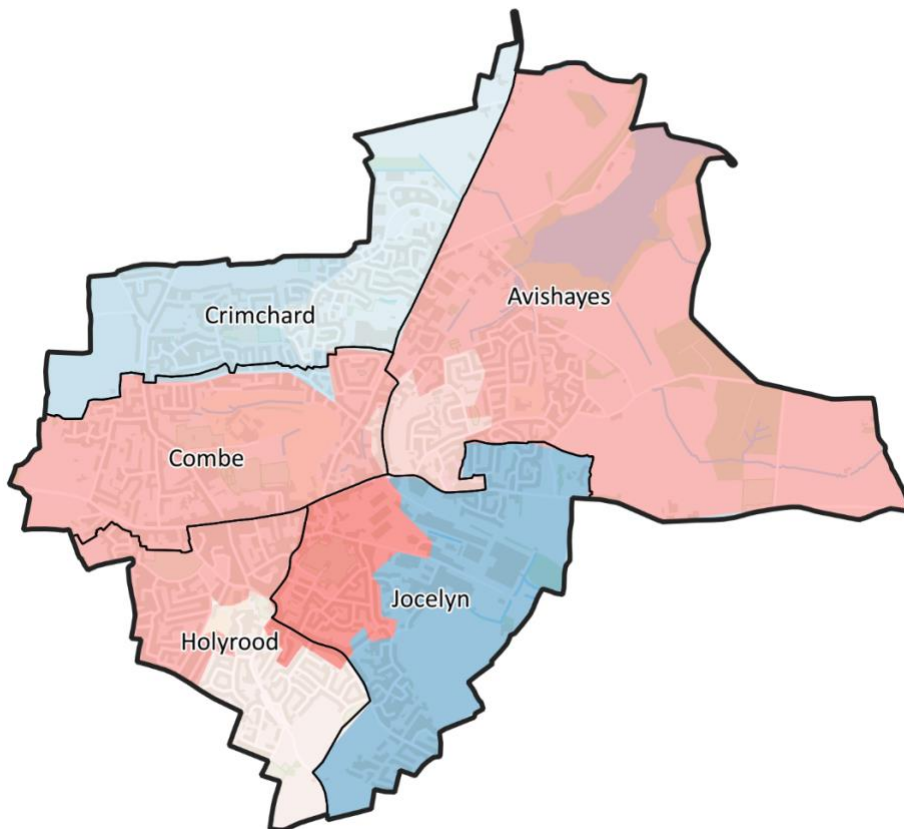


Source: SSDC Retail Monitoring January/February 2021

### 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).

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

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 **100<sup>th</sup>** is more deprived than a neighbourhood ranked **200<sup>th</sup>** 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.

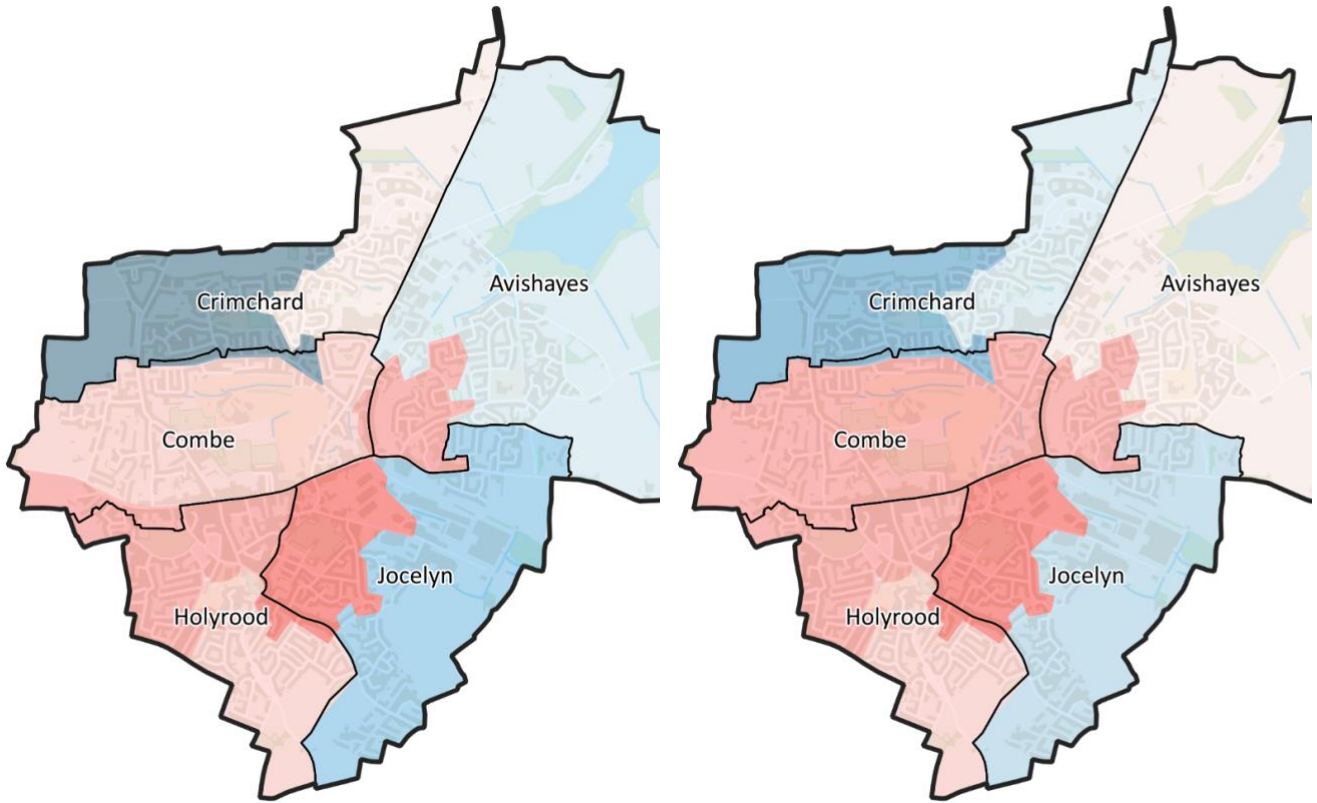
**The maps below show the relative deprivation of LSOAs in Chard compared to all LSOAs in England. This is shown for the overall index of deprivation and the 7 distinct domains. Each map is colour coded based on the deprivation decile of each LSOA, where 1 is the most deprived 10% of LSOAs in England.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

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

<b>Rank (out of 32,844 LSOAs)</b>	<b>% rank</b>	<b>Deprivation Decile</b>
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



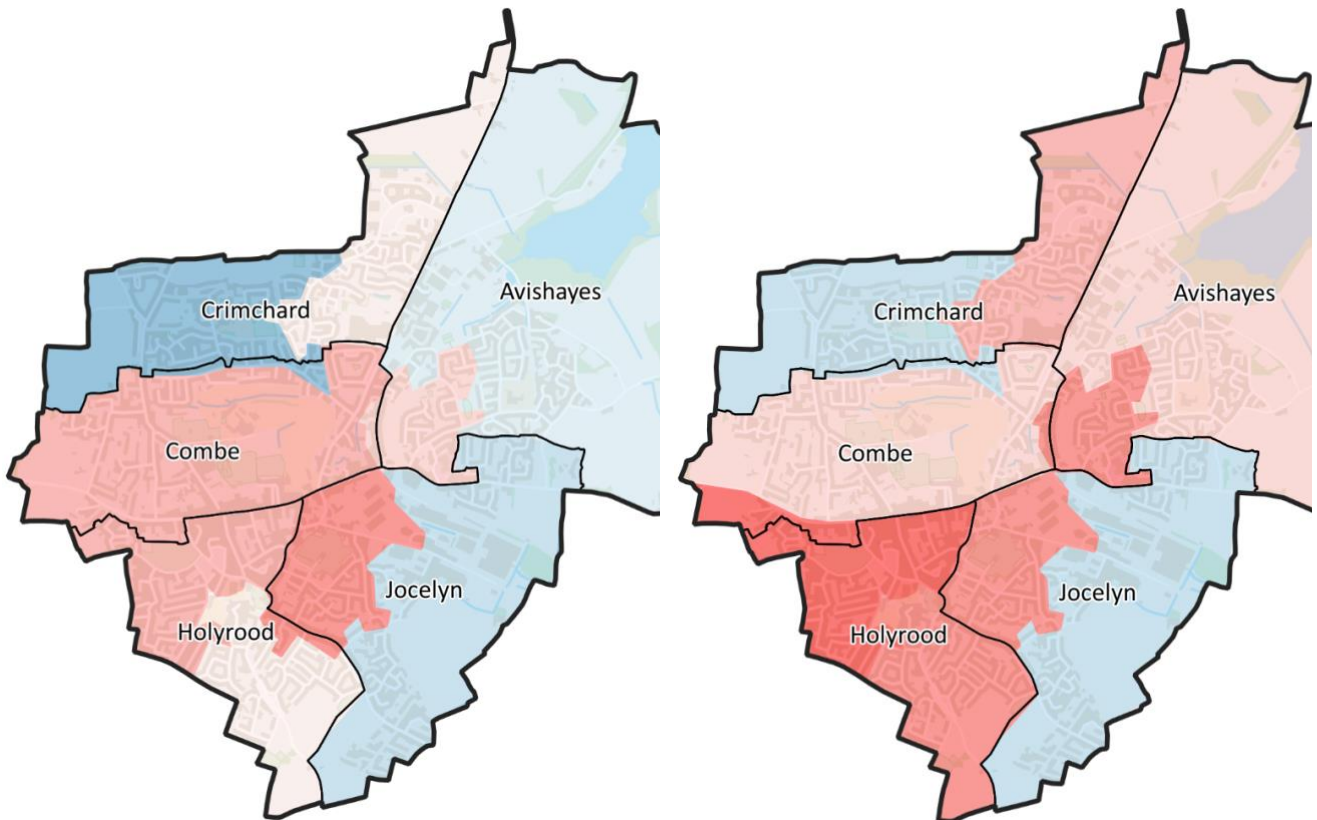
**Deprivation Decile** (where 1 is most deprived 10% of LSOAs in England).

< 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



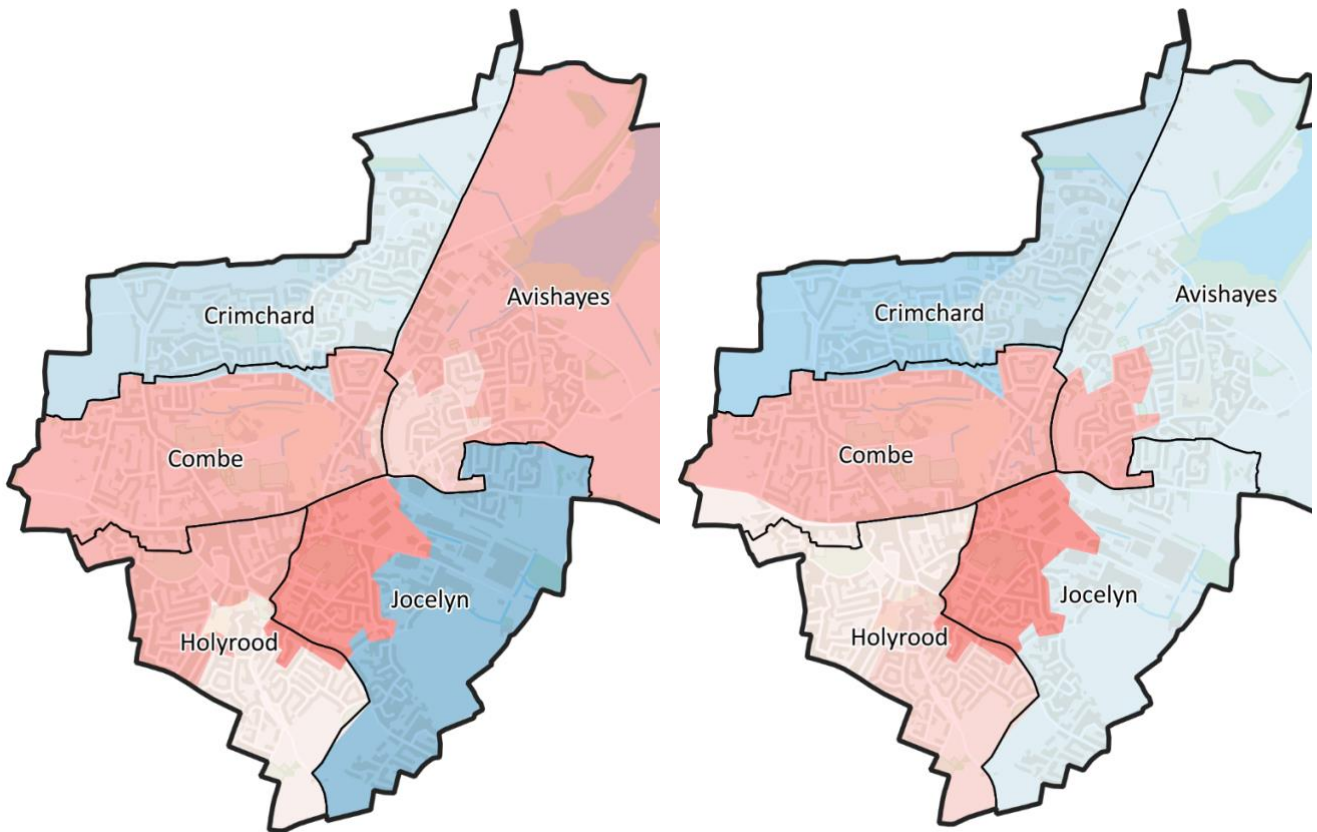
**Deprivation Decile** (where 1 is most deprived 10% of LSOAs in England).

< 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



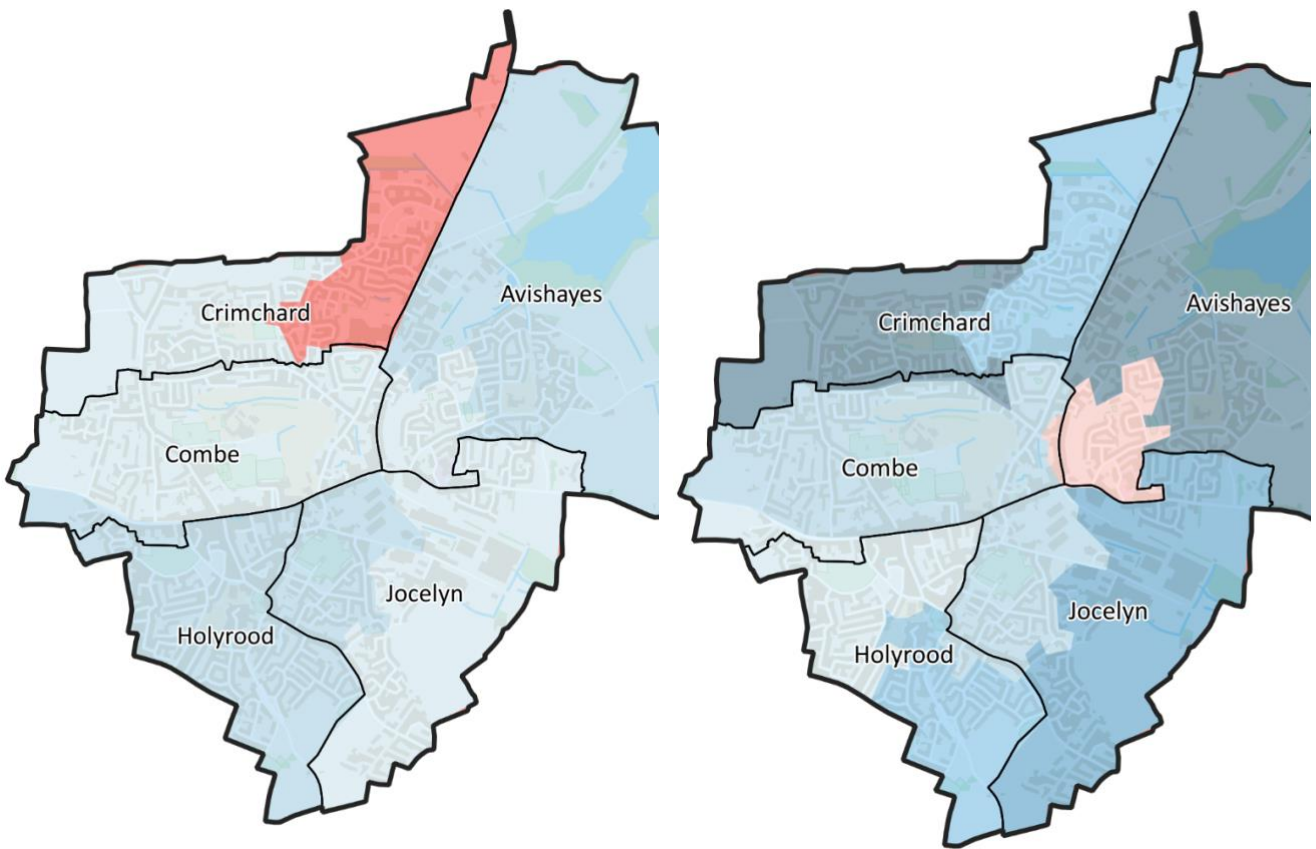
**Deprivation Decile** (where 1 is most deprived 10% of LSOAs in England).

< 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](#)

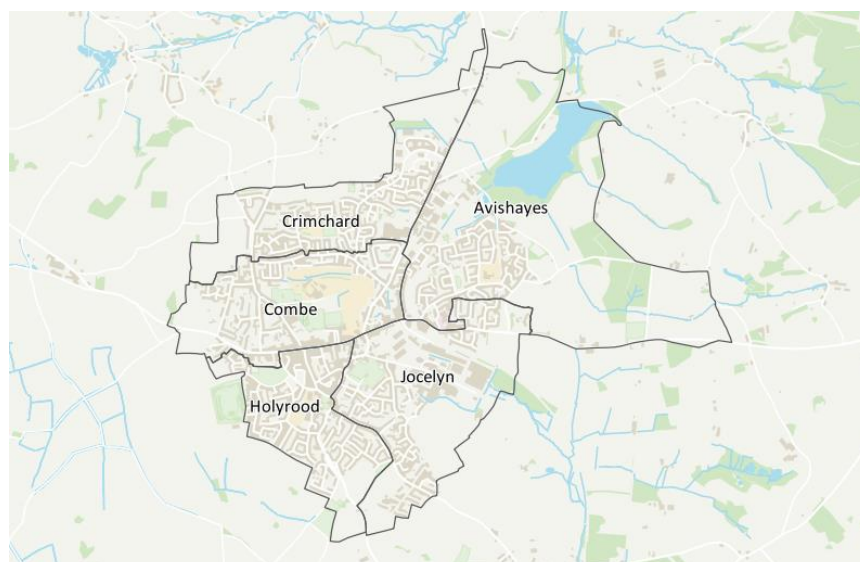


## **Appendix 2 – Chard Wards Socio-Economic Profiles**

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	<b>21.4%</b>	15.2%	19.4%	18.2%	17.6%
Age 65+	19.3%	<b>28.9%</b>	23.0%	23.8%	<b>25.4%</b>
All age mortality Rate*	+12%	+17%	-16%	-10%	<b>+63%</b>
Crime rates*					
Violence & Sexual	+23%	<b>+54%</b>	-31%	<b>+50%</b>	-18%
Anti-social behaviour	+73%	<b>+116%</b>	-45%	<b>+110%</b>	+68%
Free School Meals*	+38%	-14%	+33%	+30%	<b>+58%</b>
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.



## Equality Impact Relevance Check Form



The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. This tool will identify the equalities relevance of a proposal, and establish whether a full Equality Impact Assessment will be required.

What is the proposal?	
Name of the proposal	Future Chard Strategy 2021-2035
Type of proposal (new or changed Strategy, policy, project, service or budget):	New strategy
Brief description of the proposal:	A whole-place view of Chard with pathway to social & economic wellbeing
Name of lead officer:	Anna Matthews/Peter Paddon

You should consider whether the proposal has the potential to negatively impact on citizens or staff in the following ways:

- Access to or participation in a service,
- Levels of representation in our workforce, or
- Reducing quality of life (i.e. health, education, standard of living)

A negative impact is any change that could be considered detrimental. If a negative impact is imposed on any citizens or staff with protected characteristics, the Council has a legal duty to undertake a full Equality Impact Assessment.

Could your proposal negatively impact citizens with protected characteristics? (This includes service users and the wider community)	<b>NO</b>
Could your proposal negatively impact staff with protected characteristics? (i.e. reduction in posts, changes to working hours or locations, changes in pay)	<b>NO</b>

<b>Is a full Equality Impact Assessment required?</b>	<b>NO</b>
<b>If Yes,</b> Please provide a brief description of where there may be negative impacts, and for whom. Then complete a full Equality Impact assessment Form	
<b>If No,</b> Please set out your justification for why not.	
The strategy has been developed in close consultation with organisations in Chard, to ensure that different voices in the community have been represented. It has also been subject to formal public consultation, plus informal online and inperson to those who may not have been able to come to us (e.g. older people's luncheon club). However, as the Strategy's action plan with its associated projects and service are delivered these will need to be subject to their own Equality Impact Assessments.	
Service Director / Manager sign-off and date	Peter Paddon 18/01/22
Equalities Officer sign-off and date	Dave Crisfield 18 <sup>th</sup> January 2022

## Council Tax Policies

Executive Portfolio Holder: Peter Seib, Finance & Legal Services  
Strategic Director: Kirsty Larkins, Director – Service Delivery  
Lead Officer: Alison Hann – Specialist – Principal Revenues  
Alison.hann@southsomerset.gov.uk or 01935 462086

## Purpose of the Report

1. To request that the District Executive approve the new document Policy for Second Homes, Long Term Empty Properties and determining discounts for certain dwellings.
2. To request that the District Executive approve the amendments to the Council Tax S13A (1) (c) Local Government Act 1992 Policy (Discretionary Reduction in Council Tax Liability)

## Forward Plan

3. This report appeared on the District Executive Forward Plan with an anticipated Committee date of February 2022.

## Public Interest

4. This report gives an overview of the proposed introduction of a policy document regarding Second Homes, Long Term Empty Properties and determining discounts for certain dwellings and the proposed changes to the Council Tax S13A (1) (c) Local Government Act 1992 Policy (Discretionary Reduction in Council Tax Liability).

## Recommendations

5. That the District Executive recommend that the Chief Executive:
  - Approve the introduction of a policy document which collates current Council practice in the administration of discounts and premiums for empty properties.
  - Approve the amendments to the S13A (1) (c) Local Government Act 1992 Policy (Discretionary Reduction in Council Tax Liability).

## Background

6. The Local Government Finance Act 2012 amended the Local Government Finance Act 1992 allowing local discretion over the implementation of certain discounts in place of statutory exemptions and also allows for the use of premiums for certain



## South Somerset District Council

long term empty premises. The intention of Central Government is to allow Councils the flexibility in raising additional Council Tax. In addition, Government is keep to ensure that premises do not remain unoccupied or unused for extensive periods and to encourage the maximum use of all available premises within Council areas.

7. The document in appendix 1, does not represent any changes to the current procedures and practices already agreed at South Somerset District Council, but merely formalises our approach by setting these out in a policy document.
8. Under S13A (1) (c) of the Local Government Finance Act 1992 (as amended). The Council has the ability to reduce liability for Council Tax in relation to individual cases or class(es) of cases that it may determine where national discounts and exemptions cannot be applied.
9. The policy in Appendix 2 is divided into three main areas:
  - The Flood Recovery Framework (activated by Central Government as necessary).
  - Care Leavers (discount agreed by this committee in June 2021)
  - Granting of reductions in Council Tax liability in all other circumstances.
10. Agreement is sought to the changes in the policy under point 9c

### **Policy for Second Homes, Long Term Empty Properties and determining discounts for certain dwellings.**

11. This report does not seek to amend any of the discounts previously agreed by South Somerset District Council which can be summarised as follows:
  - Second Homes (Empty but Furnished) - 0% discount
    - i. Where the property is no-ones sole or main residence but is furnished 0% discount.
  - Second Homes – 50% discount
    - i. Where the dwelling is furnished but unoccupied because the owner is liable to Council Tax elsewhere in job-related accommodation.
    - ii. Where the dwelling is furnished but left empty by service personnel resident in accommodation provided by the Ministry of Defence.
    - iii. Where members of the clergy are required to live in accommodation provided by their employer to perform the duties of their office
    - iv. Where the dwelling is a caravan or houseboat.
  - Empty and unfurnished properties – 100% for 3 months only beginning on the first day the chargeable dwelling became empty.



## South Somerset District Council

- Empty dwelling, requiring or undergoing structural alteration or major repair works to make it habitable – 100% discount for 12 months
  - Long Term Empty Properties – 0% discount after initial 3 month discount
    - i. A 100% premium will be charged on properties empty for more than 2 years.
    - ii. A 200% premium will be charged on properties empty for more than 5 years.
    - iii. A 300% premium will be charged on properties empty for more than 10 Years.
12. In accordance with legislation, premiums will not be charged in the case of armed forces accommodation, armed forces job related accommodation or annexes.
13. The policy document in appendix 1 is simply a formalisation of these previously agreed charges to improve transparency with our customers.

### **S13A (1) (c) Local Government Finance Act 1992 Policy (Discretionary Reduction in Liability)**

14. The proposed policy document is in appendix 2. The changes made are to simplify the policy both for the ease of understanding for customers and to ease the administrative burden on officers.
15. The key changes to the policy apply to section 6.0 – ‘Applications for S13A (1) (c) in other cases’. Currently there are three headings under which a customer could apply under this section and they have to make clear in their written application under which of these their application was made. This has caused problems in the administration of the discount as customers often missed this step and applications required further manual intervention by case officers to assist the customer in their application and understanding of the policy.
16. The current headings are consolidated in the new policy document under point 6.0 in order to make the application process more accessible, we will only require a written application from the customer in an appropriate format. It will then be for the officer owning the case to classify and seek relevant approval for any recommendations.
17. During the Covid-19 pandemic, the service delivery case team saw an increase in demand for applications under this scheme. This highlighted the following key issues in the current policy:
- It was too prescriptive and often limited the amount of cases that could be put forward for consideration due to clashes with our administration of the Empty Homes Premium. This risks fettering our discretion as a Council and could leave us open to many challenges to the Valuation Tribunal.
  - It was not easily understood by either case officers or the customers.



## South Somerset District Council

- The application process is very long for the customer from start to finish, needing authorisation from both S151 officer and Portfolio Holder for even the smallest discount to be awarded.
18. This report seeks agreement to change the delegation process for applications under S13A (1) (c) from 1<sup>st</sup> April 2022 (see section 7.0 of the policy):
- All applications relating to exceptional financial hardship will be assessed by officers.
  - The Section 151 officer will have the delegated responsibility to decide on how to administer all other cases.
19. It is proposed that from 1<sup>st</sup> April 2022 where any application is refused, the applicant will be notified that they can ask for the decision to be reviewed within one month of the decision letter. Another officer shall undertake the review and respond within two months and will have regard to any further evidence supplied. If the applicant is dissatisfied with the outcome of the review, they can, within two months of the Council's reply, appeal to the independent Valuation Tribunal Service to consider their case (See section 9.0 of the policy).

### Financial Implications

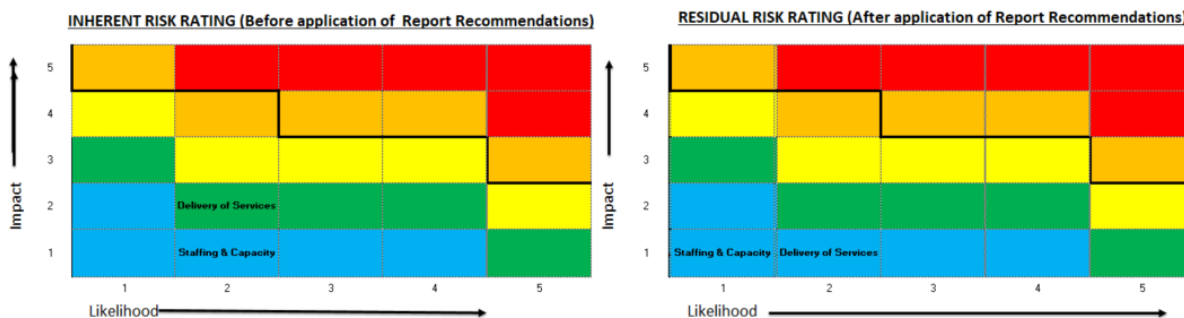
20. No further funding is being requested toward either policy, it is anticipated that the current s13a revenues allocation is sufficient. It is important to note that the award of a deserving case cannot by law be declined due to budget constraints. That said, even with the increase in applications due to Covid 19 we have not exceeded the budgeted amount in 2021/22.

### Legal implications (if any) and details of Statutory Powers

21. Local Government Finance Act 1992 [Local Government Finance Act 1992 \(legislation.gov.uk\)](https://www.legislation.gov.uk)

### Risk Matrix





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

Risk Description	Mediation / Controls
Ongoing procedures, not a project	0
No financial implications	0
High burden of administration creates backlog of work	New s13a policy reduces administrative burden
Staff face challenges on decisions without written policy information available to customers	New documents available to customers on the website
Rules not seen as transparent by customers	New documents available to customers on the website
No Health and Safety Implications	0
Risk of increased appeals to Valuation Tribunal due to wait times	0

## Council Plan Implications

22. Protecting core services – ensuring a modern, efficient and effective council that delivers for its communities.
- Deliver a high quality, effective and timely service to our customers and communities.

## Carbon Emissions and Climate Change Implications

23. None associated with this report.

## Equality and Diversity Implications

<i>An Equality Impact Relevance Check Form has been completed in respect of the Proposal?</i>	Yes / <del>No</del>
<i>The Impact Relevance Check indicated that a full EIA was required?</i>	<del>Yes</del> / No
<i>If an EIA was <b>not</b> required please attach the Impact Relevance Check Form as an Appendix to this report and provide a brief summary of its findings in the comments box below.</i>	
<i>If an EIA <b>was</b> required please attach the completed EIA form as an Appendix to this report and provide a brief summary of the result of your Equality Impact Assessment in the comment box below.</i>	
<b>Additional Comments</b>	



## **Privacy Impact Assessment**

24. No additional privacy impacts associated with this report, Council tax is processed by SSDC staff in accordance with Data Protection and Data Security guidelines.

## **Background Papers**

25. The following background papers can be viewed on the council website
- Report to District Executive – December 2012 – item 8
  - Report to District Executive – January 2019 – item 11
  - Report to District Executive – January 2015 – item 15

**Policy Name: Council Tax - Policy for Second Homes, Empty Properties  
and discounts for certain dwellings**

Version:	1.0
Service:	Service Delivery
Author:	Alison Hann – Principal Revenues
Review Date:	February 2022

## Contents

1.0	Definitions .....	3
2.0	Introduction.....	4
	Legislation.....	4
3.0	Second Homes – Policy effective from 1 <sup>st</sup> April 2022 .....	4
4.0	Empty dwellings (Class C) – Policy effective from 1 <sup>st</sup> April 2022 .....	5
5.0	Empty dwelling, requiring or undergoing structural alterations or major repair works to make it habitable (Class D) - Policy effective from 1 <sup>st</sup> April 2022 .....	6
6.0	Long Term Empty premises – Empty Homes Premium – Policy effective from 1 <sup>st</sup> April 2022 .....	6
7.0	Publication of the changes .....	7

## 1.0 Definitions

### Interpretation – an explanation of the terms used within this policy

- 1.1 In this policy
- 'Caravan'** shall be construed in accordance with Part I of the Caravan Sites and Control of Development Act 1960;
  - 'Class A exemption'** shall be construed in accordance with the Council Tax (Exempt Dwellings) Order 1992;
  - 'Class C exemption'** shall be construed in accordance with the Council Tax (Exempt Dwellings) Order 1992
  - 'Class C discount'** shall be construed in accordance with The Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003;
  - 'Class D, E & F discount'** shall be construed in accordance with The Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003 as amended;
  - 'Empty Homes Premium'** shall be construed in accordance with Section 11b Local Government Finance Act 1992;
  - 'Job-related accommodation'** shall be construed in accordance with the Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003;
  - 'Long term empty premises'** means all dwellings, which remain unoccupied and substantially unfurnished for a period in excess of six months;
  - 'Second Homes'** shall be construed in accordance with The Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003;
  - 'Substantially unfurnished'** means premises where it has been decided by the Council that it has insufficient items to be considered as furnished – each case is determined on an individual basis;
  - 'Technical Reforms'** means the changes applied to the Council Tax regime by Central Government effective from 1<sup>st</sup> April 2013;
  - 'Unoccupied Dwelling'** shall be construed in accordance with The Council Tax (Prescribed Classes of Dwellings) (England) (Amendment) Regulations 2012

## **2.0 Introduction**

- 2.1 The Local Government Finance Act 2012 amended the Local Government Finance Act 1992 allowing local discretion over the implementation of certain discounts in place of statutory exemptions and also allows for the use of premiums for certain long term empty premises. The intention of Central Government is to allow Councils the flexibility in raising additional Council Tax. In addition, Government is keen to ensure that premises do not remain unoccupied or unused for extensive periods and to encourage the maximum use of all available premises within Council areas.
- 2.2 The following policy details the current approach taken by the Council.

### **Legislation**

- 2.3 The relevant legislation is as follows:
- Section 11a Local Government Finance Act 1992 - Power to determine further discounts for certain dwellings;
  - Section 11b Local Government Finance Act 1992 - Higher amount for long-term empty dwellings: England;
  - The Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003 as amended by The Council Tax (Prescribed Classes of Dwellings) (England) (Amendment) Regulations 2012;
  - The Council Tax (Exempt Dwellings) (England) (Amendment) Order 2012; and
  - Rating (Property in Common Occupation) and Council Tax (Empty Dwellings) Act 2018.

## **3.0 Second Homes – Policy effective from 1<sup>st</sup> April 2022**

- 3.1 Within the Council Tax legislation, a second home is defined as a dwelling, which is no one's sole or main residence but which is furnished. The Council, under this policy, has determined that from 1<sup>st</sup> April 2012, a charge of 100% will be applied for second homes (a discount of 0%).
- 3.2 The charge applies to all cases except where the legislation determines otherwise and, in those cases, (as follows) a charge of 50% will apply (rather than the 100%) as required by legislation:
- Dwellings which are furnished but unoccupied because the owner is liable to a Council Tax elsewhere in job-related accommodation;
  - Empty but furnished dwellings of service personnel resident in accommodation provided by the Ministry of Defence;
  - If the dwelling is a caravan or houseboat; or
  - Where members of the clergy are required to live in accommodation provided by their employer to perform the duties of their office.

- 3.3 For the purposes of the Council Tax (Prescribed Classes of Dwellings) (England) Regulations 2003 as amended by the Council Tax (Prescribed Classes of Dwellings) (England)(Amendment) Regulations 2012 the Council is required to determine the classes under which a discount will be granted. For the purposes of this policy the classes and discounts granted by the Council from 1<sup>st</sup> April 2013 are as follows:

Class	Description	Discount
A	A dwelling; a. Which is not the sole or main residence of an individual; b. Which is furnished; and c. The occupation of which is restricted by a planning condition preventing occupancy for a continuous period of at least 28 days in the relevant year	0%
B	A dwelling; a. Which is not the sole or main residence of an individual; b. Which is furnished; and c. The occupation of which is not restricted by a planning condition preventing occupancy for a continuous period of at least 28 days in the relevant year;	0%

#### **4.0 Empty dwellings (Class C) – Policy effective from 1<sup>st</sup> April 2022**

- 4.1 For Council Tax purposes, the legislation determines that an empty dwelling is one which is unoccupied and substantially unfurnished dwellings as defined within the Council Tax (Prescribed Class of Chargeable Dwellings) Regulations 2003.
- 4.2 The Council has resolved that, from 1<sup>st</sup> April 2022, if a dwelling becomes unoccupied and substantially unfurnished 100% discount will be given for a period of 3 months only starting with the first day the chargeable dwelling became empty.
- 4.3 No further discount can be applied to a chargeable dwelling until such time as it is re-occupied and furnished for a period of 6 weeks or more.

## **5.0 Empty dwelling, requiring, or undergoing structural alterations or major repair works to make it habitable (Class D) - Policy effective from 1<sup>st</sup> April 2022**

- 5.1 Class D is defined as every chargeable dwelling:
- (a) Which satisfies the requirement set out in paragraph (b) unless it has been such a dwelling for a continuous period of twelve months or more ending immediately before the day in question;
  - (b) The requirement referred to in paragraph (a) is that the dwelling is vacant and:
    - (i) Requires or is undergoing major repair work to render it habitable, or
    - (ii) Is undergoing structural alteration; or
    - (iii) Has undergone major repair work to render it habitable, if less than six months have elapsed since the date on which the alteration was substantially completed, and the dwelling has continuously remained vacant since that date.
- 5.2 For the purposes of paragraph (b) above 'major repair work' includes structural repair work.
- 5.3 For the purposes of Class D a dwelling is vacant on any day if on the day;
- (i) In the case of a dwelling consisting of a pitch occupied by a caravan or a mooring occupied by a boat, the caravan or boat is unoccupied;
  - (ii) In any other case, the dwelling is unoccupied and substantially unfurnished; and
  - (iii) In considering whether a dwelling has been vacant for any period, any one period, not exceeding six weeks, during which it was not vacant shall be disregarded
- 5.4 The Council has resolved that from 1<sup>st</sup> April 2022 a discount of 100% will be given in respect of Class D (for a period of 12 months).

## **6.0 Long Term Empty premises – Empty Homes Premium – Policy effective from 1<sup>st</sup> April 2022**

- 6.1 Legislation allowing for the premium was introduced in 2012, this inserted Section 11b Local Government Finance Act 1992 - Higher amount for long-term empty dwellings.
- 6.2 The Council has resolved that from 1<sup>st</sup> April 2022, an Empty Homes Premium will be applied, in addition to the full (100%) charge, for all premises which has been unoccupied and substantially unfurnished (empty) for a period of two years or more as follows:
- A 100% premium will be charged on long term (more than 2 years) empty dwellings (in addition to the normal charge).



- A 200% premium will be charged on long term (more than 5 years) empty dwellings (in addition to the normal charge);
- A 300% premium will be charged on long term (more than 10 years) empty dwellings (in addition to the normal charge).

6.3 Liability for the Empty Homes Premium is determined by the length of time that the property has been empty. An individual who purchases a property, which has already been empty for two-years, may be required to pay the premium as soon as they take ownership. A period of occupation of over six weeks qualifies as a break in the empty period, 'resetting the clock' for the purposes of the Empty Homes Premium.

6.4 In accordance with the legislation, premiums will not be charged in the case of armed forces accommodation, armed forces job related accommodation or annexes as defined below.

### **Armed Forces Accommodation or Armed forces job related accommodation (Class E)**

- 6.5 Chargeable dwellings in Class E are defined as a dwelling which:
- Is the sole or main residence of an individual where that individual is a qualifying person in relation to another dwelling provided by the Secretary of State for Defence for the purposes of armed forces accommodation, and which for that individual is job-related; or
  - Would be the sole or main residence of an individual if that individual were not a qualifying person in relation to another dwelling provided by the Secretary of State for Defence for the purposes of armed forces accommodation, and which for that individual is job-related

### **Annexes (Class F)**

- 6.6 An annex is a chargeable dwelling:
- Which forms part of a single property which includes at least one other dwelling; and
  - Which is being used by a resident of that other dwelling, or as the case may be, one of those other dwellings, as part of their sole or main residence.

## **7.0 Publication of the changes**

7.1 The Council, in accordance with the legislation, will publish any changes to the Council Tax regime within 21 days of making such a resolution.

**Policy Name: Council Tax – S13A 1 C**

Version:	1.0
Service:	Service Delivery
Author:	Alison Hann – Principal Revenues
Review Date:	February 2022

## Contents

1.0	Introduction.....	3
2.0	Legislation.....	3
3.0	Finance .....	4
4.0	The Flood Recovery Framework .....	4
	The Council's Policy in respect of the Flood Recovery Framework .....	5
5.0	Care Leavers .....	6
6.0	Applications for S13A (1) (c) in other cases .....	7
7.0	Delegated Powers.....	7
8.0	Notification.....	8
9.0	Review of Decisions.....	8
10.0	Duration of Reduction .....	8
11.0	Changes in circumstances and misrepresentation .....	9

## 1.0 Introduction

- 1.1 The following policy outlines the Council's approach to granting discretionary reductions in liability for Council Tax under S13A (1) (c) of the Local Government Finance Act 1992 (as amended). The Council has the ability to the reduce liability for Council Tax in relation to individual cases or class (es) of cases that it may determine where national discounts and exemptions cannot be applied.
- 1.2 This policy is basically divided into three main areas namely:
- (a) **The Flood Recovery Framework** – this part of the policy covers situations outlined by Central Government where any parts of the Council's area were to be designated as a designated flood area;
  - (b) **Care Leavers** – this part of the policy applies to circumstances where the Council supports certain Care Leavers; and
  - (c) **Granting of reductions in Council Tax liability in all other circumstances** - this part of the policy applies to all other circumstances where an application is made to the Council for a reduction in Council Tax liability under S13A (1) (c) of the Local Government Finance Act 1992 other than in respect of (a) above.

## 2.0 Legislation

- 2.1 The relevant legislation (S13 of the Local Government Finance Act 1992 as amended by the Local Government Finance Act 2012), states the following:

### **Reductions by billing authority**

(1) The amount of council tax which a person is liable to pay in respect of any chargeable dwelling and any day;

(a) in the case of a dwelling situated in the area of a billing authority in England, is to be reduced to the extent, if any, required by the authority's council tax reduction scheme;

(b) in the case of a dwelling situated in the area of a billing authority in Wales, .....

**(c) in any case, may be reduced to such extent (or, if the amount has been reduced under paragraph (a) or (b), such further extent) as the billing authority for the area in which the dwelling is situated thinks fit.**

- 2.2 The provisions stated in (c) above, allows the Council to reduce the Council Tax liability for any taxpayer in addition to any application for Council Tax Reduction under the Council's scheme. This is a general power that has always been available to the Council.

- 2.3 It should be noted that the Council maintains a separate Exceptional Hardship Fund within its Council Tax Reduction scheme should any applicant require additional assistance **and** suffer exceptional hardship.

### **3.0 Finance**

- 3.1 Any amounts granted under S13A (1) (c) are normally financed through the Council's general fund and do not form part of the collection fund. In certain circumstances, Central Government provides funding directly to the Council to compensate for specific events such as in the case of severe flooding. Where this is available, the Council will look to use **all** funding provided.
- 3.2 Any additional assistance, outside of the funding, would fall to be paid by the Council itself.

### **4.0 The Flood Recovery Framework**

- 4.1 In a severe weather event with significant wide area impacts, local authorities may need central support to help their communities and businesses return to normal. Building on these principles, a core package of business and community recovery support has been developed by Central Government to serve as a framework for flood recovery funding when needed.
- 4.2 It will be for Government Ministers to determine when this support will be made available. Weather incidents with localised impacts will not usually trigger a recovery support package.
- 4.3 In relation to Council Tax, Central Government have developed a Council Tax discount package that is available under S13A (1) (c).

#### **Who is eligible for a council tax discount?**

- 4.4 Where the Council Tax Discount Scheme is activated following severe weather, MHCLG will refund eligible local authorities for granting discounts in the following circumstances:
- (a) 100% discount for a minimum of 3 months, or while anyone is unable to return home if longer, for **primary residences** whereas a result of the relevant weather event:
- Flood water entered into the habitable areas; or,
  - Flood water did not enter into the habitable areas, but the local authority regards that the residence was otherwise considered **unliveable** for any period of time. **AND**
- (b) 100% council tax discount on temporary accommodation for anyone unable to return to their home, in parallel with the discount on their primary residence where applicable.

- 4.5 Second homes and empty homes will **not** be eligible.
- 4.6 Instances where households might be considered **unliveable** could include:
- where access to the property is severely restricted (e.g. upper floor flats with no access);
  - key services such as sewerage, draining, and electricity are severely affected;
  - the adverse weather has resulted in other significant damage to the property such that it would be, or would have been, advisable for residents to vacate the premises for any period of time, regardless of whether they do vacate or not;
  - flooded gardens or garages will **not** usually render a household eligible but there may be exceptions where it could be demonstrated that such instances mean effectively that the property is unliveable.
- 4.7 It will be for the Council to determine eligibility under the scheme.

#### **Properties affected by multiple instances of flooding**

- 4.8 Residences impacted in multiple flood events will not be precluded from repeat support where this is made available by Government in respect of separate weather events.
- 4.9 Where the scheme is activated for two separate instances of flooding within 3 months of each other, the two discount periods will run concurrently. For example, if the second flood event occurred after 2 months, flooded properties already receiving support could be eligible for another 3 months' discount, making the total period of reimbursement 5 months.

#### **Funding**

- 4.10 In such cases, Central Government will make payment to the Council via a Section 31 grant.

#### **The Council's Policy in respect of the Flood Recovery Framework**

- 4.11 The Council shall operate the scheme strictly in accordance with Central Government guidelines.

## **5.0 Care Leavers**

### **Background**

- 5.1 A report written by the Children's Society in 2015 (The Wolf at the Door, how council tax debt collection is harming children) suggests that Care Leavers are a particularly vulnerable group for council tax debt. It found that when the Care Leavers move into independent accommodation and begin to manage their own budget fully for the first time that in particular, they are falling behind on their council tax.
- 5.2 The Children's Society report made a number of recommendations including making care leavers entitled to a council tax discount. This would help to relieve some of the initial pressure and would be part of other financial support made available to care leavers.
- 5.3 From April 2019, following agreement at District Executive in January 2019 a reduction in liability for Care Leavers was introduced and awarded under section 13A (1) (c) Local Government Finance Act 1992 as follows:

### **April 2019 to 31<sup>st</sup> March 2022**

- 5.4 A 100% reduction in liability is awarded to any Care Leaver who:
- (a) has a liability for Council Tax;
  - (b) who is living on their own in a dwelling; and
  - (c) is between the ages of 18 and 21.
- 5.5 This is awarded regardless of their income.
- 5.6 Once the Care Leaver reaches the age of 22 the discount is on a sliding scale until the age of 24.
- 5.7 For Care Leavers that are aged 22 and 23, they receive a 50% reduction in liability in addition to their Single Person Discount.
- 5.8 Care Leavers who are aged 24 receive a 25% reduction in liability in addition to their Single Person Discount.
- 5.9 For those aged 25 and over, no further reduction in liability applies and they solely receive the Single Person Discount, if still residing in a dwelling on their own.

### **From 1<sup>st</sup> April 2022**

- 5.10 Following an approach by the leaving care team at Somerset County Council, the Council has decided to award a reduction in liability of 100% (after Single Persons Discount is applied) for all care leaver cases where they live alone up until they turn 25 years of age.

### **Eligible Care Leavers**

- 5.11 Eligible Care Leavers will **only** be those identified by Somerset County Council and notified to the District Council as such.

## **6.0 Applications for S13A (1) (c) in other cases**

- 6.1 Where the Council receives an application for a reduction in liability in any other case, all applications will be treated on their individual merits.
- 6.2 The Council has the ability to reduce the liability of:
- Individual Council Taxpayers;
  - Groups of Council Taxpayers defined by a common set of circumstances;
  - Council Taxpayers within a defined area; or
  - To all Council Taxpayers within the Council's area
- 6.3 In all such cases, the Council will require the applicant (s) (where appropriate) to:
- Make a formal application for Council Tax Reduction in an appropriate format;
  - Consider potential changes in payment methods and payment arrangements;
  - Assist the Council to minimise liability by ensuring that all discounts, exemptions and reductions are properly granted;
  - Maximise their income through the application for other welfare benefits;
  - Have taken all reasonable steps to resolve their situation prior to application;
  - Provide evidence of exceptional financial hardship or exceptional personal circumstance that would merit a reduction in the Council Tax liability; and
  - Not have access to assets, capital or other financial remedy that could be used to meet the Council Tax liability;
- 6.4 The circumstances affecting the ability to meet Council Tax liability must not be intentional by the applicant and must be deemed to be out of the applicant's individual control.

## **7.0 Delegated Powers**

- 7.1 Officers will assess and determine all exceptional financial hardship applications from individuals.
- 7.2 The Council's Section 151 Officer has delegated powers to make technical changes to this scheme.



## **8.0 Notification**

- 8.1 In all cases, the Council will issue a written decision letter to the applicant within one month of the request or as soon as practicable thereafter. This will include:
- the level of the award, if relevant;
  - full reasons for the decision;
  - how it will be paid; and
  - information about how to ask for a review of the decision.

## **9.0 Review of Decisions**

- 9.1 Where any application is refused, the applicant will be notified that they can ask for the decision to be reviewed. Any request for a review must be made, in writing or by email, within one month of the decision letter.
- 9.2 An officer shall undertake the review and shall respond within two months and will have regard to any further evidence supplied.
- 9.3 If the applicant is dissatisfied with the outcome of the review, they can, within two months of the Council's reply, appeal to the independent Valuation Tribunal Service to consider their case.

## **10.0 Duration of Reduction**

- 10.1 The duration of any award will depend on the circumstances of each case. However, in all cases the following principles will apply:
- (a) Where the reduction is applied under a Central Government Scheme, the reduction shall be applied to the Council Tax account for the period specified in Government guidance or until as such time as Central Government finance is exhausted. This will not however prevent further applications under this policy on an individual basis;
- (b) In all other cases,
- (i) the application for the reduction can only relate to the current Council Tax financial year in which the application is made unless the delay was due to an exceptional circumstance; and
  - (ii) If an application is successful, the award period will be specific to the applicant's circumstances, but it cannot exceed a period greater than the financial year it has been awarded in or exceed the total Council Tax charge for that period.

## **11.0 Changes in circumstances and misrepresentation**

- 11.1 A reduction in liability under S13A (1) (c) can be recovered if it has been made as a result of misrepresentation or failure to disclose a material fact, either fraudulently or otherwise. It can also be recovered as a result of the subsequent application of a national discount or adjustment in banding by the Valuation Office Agency
- 11.2 Changes of circumstances that subsequently negate the need for a reduction in liability under this policy will be recovered by the Council. Where this occurs, the Council shall notify the taxpayer accordingly.
- 11.3 Reductions in liability are not transferable following a change in address.
- 11.4 The Council reserves the right to recover any reductions in liability as a result of a change in legislation or regulation.
- 11.5 The Council is mindful that it is important to protect public funds and, as such, will take action to prosecute any case where the applicant acts fraudulently in applying for a reduction in Council Tax liability.

# Equality Impact Relevance Check Form



The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. This tool will identify the equalities relevance of a proposal, and establish whether a full Equality Impact Assessment will be required.

What is the proposal?	
Name of the proposal	Council Tax Discounts
Type of proposal (new or changed Strategy, policy, project, service or budget):	Minor change to existing policies
Brief description of the proposal:	Agreement sought to update policies on Council Tax discretionary discounts
Name of lead officer:	Alison Hann

You should consider whether the proposal has the potential to negatively impact on citizens or staff in the following ways:

- Access to or participation in a service,
- Levels of representation in our workforce, or
- Reducing quality of life (i.e. health, education, standard of living)

A negative impact is any change that could be considered detrimental. If a negative impact is imposed on any citizens or staff with protected characteristics, the Council has a legal duty to undertake a full Equality Impact Assessment.

Could your proposal negatively impact citizens with protected characteristics? (This includes service users and the wider community)	<b>NO</b>
Could your proposal negatively impact staff with protected characteristics? (i.e. reduction in posts, changes to working hours or locations, changes in pay)	<b>NO</b>

<b>Is a full Equality Impact Assessment required?</b>	<b>NO</b>
<b>If Yes,</b> Please provide a brief description of where there may be negative impacts, and for whom. Then complete a full Equality Impact assessment Form	
<b>If No,</b> Please set out your justification for why not.	
The proposed changes will not limit any discounts, rather it will increase the scope of the policies and the number of people experiencing financial disadvantage who will qualify for discounts. In this respect the revised policies will deliver positive impacts for people across the protected characteristics who are disadvantaged by reasons of financial inequality.	
Service Director / Manager sign-off and date	Kirsty Larkins 22/1/22
Equalities Officer sign-off and date	Dave Crisfield 24 <sup>th</sup> January 2022

## Business Rate Reliefs

Executive Portfolio Holder: Peter Seib, Finance & Legal Services  
Strategic Director: Kirsty Larkins, Director Service Delivery  
Lead Officer: Alison Hann, Specialist - Principal Revenues  
Contact Details: Alison.hann@southsomerset.gov.uk or 01935 462086

## Purpose of the Report

1. To request that the District Executive approve the use of the Council's local discount powers to award Retail, Hospitality and Leisure Relief from 1 April 2022
2. To request that the District Executive approve the use of the Council's local discount power to retrospectively award the Covid Additional Relief Fund (CARF) from 1 April 2021 to 31 March 2022 and delegate authority to the Director of Service Delivery and the Executive portfolio holder for Finance to approve the scheme once written.
3. To request that the District Executive approve the use of the Council's local discount powers to award Transitional and Supporting Small Business Rates Relief from 1 April 2022
4. To make District Executive aware of the new Mandatory Relief for public toilets.
5. To request that District Executive approve the updated Discretionary Business Rates Relief Policy.

## Forward Plan

6. This report appeared on the District Executive Forward Plan with an anticipated Committee date of February 2022.

## Public Interest

7. At the budget on 27<sup>th</sup> October 2021 the Chancellor announced the introduction of a new business rates relief scheme for retail, hospitality and leisure properties worth almost £1.7 billion in 2022/23. This will support businesses that make our high streets and town centres a success and help them to evolve and adapt to changing consumer demands.
8. On 25<sup>th</sup> March 2021 the government announced a new Covid-19 Additional Relief fund of £1.5 billion. This received Royal Assent in December 2021. The fund will be available to support those businesses affected by the pandemic but that are ineligible for existing support linked to business rates.



9. The transitional relief scheme was introduced in 2017 to help those ratepayers who were faced with higher bills as a result of the revaluation. The scheme ends on 31<sup>st</sup> March 2022, as a result a small number of ratepayers would face a jump to their full rates bill from 1 April 2022. The government announced at the budget on 27<sup>th</sup> October 2021 that for certain ratepayers the scheme would be extended for one year.

## Recommendations

10. That the District Executive recommend that the Chief Executive:
  - a. Approve the use of the Councils local discretionary powers to award retail, hospitality and leisure relief of 50 percent from April 2022 for one year.
  - b. Approve the use of the Councils local discretionary powers to award CARF relief retrospectively from 1 April 2021 to 31 March 2022. And delegate final approval of the scheme adopted to the Director of Service Delivery and the Portfolio Holder for Finance.
  - c. Approve the use of the Councils local discretionary powers to award transitional relief and supporting small business rates relief from April 2022 for one year.
  - d. Approve the updated Discretionary Business Rates Relief Policy.

## Background

11. In March 2020 in response to the Coronavirus pandemic the Chancellor of the Exchequer in his emergency budget announced that relief for retail businesses would be increased from 33% to 100% and that eligibility would be extended to include Hospitality and Leisure businesses for the 2020/21 Financial year. In the Autumn budget of 2020, it was announced that this package would continue until July 2021, after which time the discount was reduced to 66% until 31<sup>st</sup> March 2022
12. In the Autumn budget of 2021, it was announced that from April 2022 a new Retail, Hospitality and Leisure business rates relief scheme would provide eligible, occupied properties with a 50% relief up to a cash cap limit of £110,000 per business.
13. On 25 March 2021 the Government announced a new COVID-19 Additional Relief Fund (CARF) of £1.5 billion. Guidance to apply this relief was received in December 2021 and the fund will be available to support those businesses affected by the pandemic and are not eligible for existing support linked to business rates. This relief will be provided in the form of a reduction in business rates liability for the 2021/22 financial year rather than as a cash grant payment.



## South Somerset District Council

14. The transitional relief scheme was introduced in 2017 to help those ratepayers who were faced with higher bills as a result of the revaluation. The scheme was due to end on 31 March 2022, but government has announced that it would extend the transitional relief (TR) scheme and the supporting small business scheme (SSB) for one year to the end of the current revaluation cycle.
15. At the 2018 Budget the Chancellor announced a mandatory business rate relief for public lavatories. The Non-Domestic Rates (Public Lavatories) Bill received royal assent in late 2021.

### Retail, Hospitality and Leisure Business Rate Relief

16. The 2022/23 Retail, Hospitality and Leisure Business Rates Relief scheme will provide eligible, occupied, retail, hospitality and leisure properties with a 50% relief up to a cash cap limit of £110,000 per business.
17. As this is a temporary measure for 2022/23 only, the government is not changing legislation relating to the reliefs available to properties. Instead Local Authorities will be expected to use their discretionary relief powers under s47 of the Local Government Finance Act 1988 (as amended) to grant relief.
18. The government will fully reimburse billing authorities and major precepting authorities for their loss of income under the rates retention scheme with a grant under s31 of the Local Government Act 2003.
19. Relief will be applied directly to qualifying ratepayers from the start of the 2022/23 billing year. Subject to the £110,000 cash cap per business the total amount of government-funded relief available for each property for 2022/23 under this scheme is:
  - a. For chargeable days from 1 April 2022 to 31 March 2023, 50% of the chargeable amount. The eligibility for the discount and the relief itself will be assessed and calculated on a daily basis.
20. The relief must be applied after mandatory reliefs and other discretionary reliefs funded by section 31 grants but before those where local authorities have used their wider powers introduced by the Localism Act 2011, which are not funded by section 31 grants.
21. Under the cash cap, no ratepayer can in any circumstances exceed the £110,000 cash cap across all of their hereditaments in England.
22. The Retail, Hospitality and Leisure scheme is likely to amount to subsidy (formerly known as State Aid). Any relief provided by SSDC under this scheme will need to comply with the UK's domestic and international subsidy control obligations. In those cases where it is clear to SSDC that the ratepayer is likely to breach the cash cap or the subsidy rules, we will automatically withhold relief.

23. SSDC will automatically apply the relief to any account where Expanded Retail Relief from 2021/22 remained in payment until 31 March 2022. We will write to all entitled parties and ask ratepayers on a self-declaration basis, to inform the authority if they are in breach of the cash caps or subsidy limits.
24. Hereditaments that meet the eligibility criteria for the Retail, Hospitality and Leisure scheme will be occupied hereditaments that meet all of the following conditions on the chargeable day.
- a. They are wholly or mainly being used:
- As shops, restaurants, cafes, drinking establishments, cinemas or live music venues; or
  - For assembly and leisure; or
  - As hotels, guest & boarding premises or self-catering accommodation
25. The meaning of shops, restaurants, cafes, drinking establishments, cinemas or live music venues is further defined to mean:
- a. Hereditaments that are being used for the sale of goods to visiting members of the public:
- Shops (e.g. florists, bakers, butchers, grocers, greengrocers, jewelers, stationers, off licences, chemists, newsagents, hardware stores, supermarkets etc.)
  - Charity shops
  - Opticians
  - Post Offices
  - Furnishing shops/display rooms (such as carpet shops, double glazing, garage doors)
  - Car/caravan show rooms
  - Second Hand car lots
  - Markets
  - Petrol stations
  - Garden centres
  - Art galleries (where art is for sale or hire)
- b. Hereditaments that are being used for the provision of the following services to visiting members of the public:
- Hair and beauty services (such as hairdressers, nail bars, beauty salons, tanning shops etc.)
  - Shoe repairs/key cutting
  - Travel agents
  - Ticket offices e.g. for theatre
  - Dry cleaners
  - Launderettes
  - PC/TV/ domestic appliance repair
  - Funeral directors



## South Somerset District Council

- Photo processing
- Tool hire
- Car hire

c. Hereditaments that are being used for the sale of food and/or drink to visiting members of the public:

- Restaurants
- Takeaways
- Sandwich shops
- Coffee shops
- Pubs
- Bars

d. Hereditaments which are being used as cinemas

e. Hereditaments that are being used as live music venues:

- Live music venues are wholly or mainly used for the performance of live music for entertaining an audience. Hereditaments cannot be considered a live music venue for the purpose of business rates relief where a venue is wholly or mainly used as a nightclub or theatre for the purposes of the Town and Country Planning (Use Classes) Order 1987 (as amended.)
- Hereditaments can be a live music venue even if used for other activities, but only if those other activities are (i) merely ancillary or incidental to the performance of live music (e.g. sale and supply of alcohol) or (ii) do not affect the fact that the primary activity for the premises is the performance of live music (e.g. because those other activities are insufficiently regular or frequent).
- There may be circumstances in which it is difficult to tell whether an activity is a performance of live music or, instead, the playing of recorded music. Although we would expect this to be clear in most circumstances, further guidance can be found under section 182 of the Licensing Act 2003.

26. The Government considers assembly and leisure to mean:

a. Hereditaments that are being used for the provision of sport, leisure and facilities to visiting members of the public (including for the viewing of such activities):

- Sports grounds and clubs
- Museums and art galleries
- Nightclubs
- Sport and leisure facilities





## South Somerset District Council

- Stately homes and historic houses
- Theatres
- Tourist attractions
- Gyms
- Wellness centres, spas, massage parlours
- Casinos, gambling clubs and bingo halls

b. Hereditaments where the non-domestic part is being used for the provision of living accommodation as a business:

- Hotels, guest and boarding houses
- Holiday homes
- Caravan parks and sites

27. The following hereditaments are not considered eligible for the discount:

- Financial services (e.g. banks, building societies, cash points, bureau de change, short-term loan providers)
- Medical services (e.g. vets, dentists, doctors, osteopaths, chiropractors)
- Professional services (e.g. solicitors, accountants, insurance agents/financial advisers, employment agencies, estate agents, letting agents)
- Post office sorting offices
- Hereditaments that are not reasonably accessible to visiting members of the public

### **Covid-19 Additional Relief Fund (CARF)**

28. The Covid-19 Additional Relief Fund (CARF) will provide eligible, occupied, properties with a backdated business rate relief for the period 1 April 2021 to 31 March 2022.

29. As this is a temporary measure for 2021/22 only, the government is not changing legislation relating to the reliefs available to properties. Instead Local Authorities will be expected to use their discretionary relief powers under s47 of the Local Government Finance Act 1988 (as amended) to grant relief.

30. Central government will fully reimburse local authorities for discretionary relief awards which comply with the guidance dated December 2021 up to the maximum level of £3,021,815 for South Somerset District Council.

31. Billing authorities will be responsible for designing the discretionary relief schemes that are to operate in their areas. However they must:

- a. Not award relief to ratepayers who for the same period of the relief either are or would have been eligible for the Extended Retail Discount (covering Retail,



## South Somerset District Council

Hospitality and Leisure), the Nursery Discount or the Airport and Ground Operations Scheme (AGOSS)

- b. Not award relief to a hereditament for a period when it is unoccupied (other than hereditaments which have become closed temporarily due to the government's advice on Covid-19, which should be treated as occupied for the purpose of this relief), and
  - c. Direct their support towards ratepayers who have been adversely affected by the pandemic and have been unable to adequately adapt to that impact.
32. In line with the legal restriction in s47(8a) of the Local Government Finance Act 1988 billing authorities may not grant the discount to themselves, certain precepting authorities (e.g. a parish or county council) or a functional body, within the meaning of the Greater London Authority Act 1999.
33. It is for local authorities to determine the level of relief for individual hereditaments.
34. The relief must be applied after mandatory reliefs and other discretionary reliefs funded by section 31 grants but before those where local authorities have used their wider powers introduced by the Localism Act 2011, which are not funded by section 31 grants.
35. Relief will be applied directly to qualifying ratepayers for the period 1 April 2021 to 31 March 2022 (or part thereof that they are the qualifying ratepayer) the maximum amount of government-funded relief available for each property for 2022/23 under this scheme is:
  - a. For chargeable days from 1 April 2022 to 31 March 2023, a flat percentage of the chargeable amount (actual % amount to be confirmed with the other Somerset Authorities). The eligibility for the discount and the relief itself will be assessed and calculated on a daily basis.
  - b. We will use an occupation date of 15<sup>th</sup> December 2021 (the date that the guidance was released) to automatically award to the businesses that we identify as eligible that remain in occupation as at this date.
  - c. Eligible businesses will be asked to self-declare that they have not exceeded subsidy rules and that the business has been adversely affected by the pandemic and have been unable to adequately adapt to that impact. In those cases where it is clear to SSSDC that the ratepayer is likely to breach the subsidy rules, we will automatically withhold relief.
  - d. 5% of the funding will be reserved for cases where in partnership working with the Economic Development team we identify that awarding further relief would benefit the local economy.



## South Somerset District Council

- e. 2% of the funding will be reserved for cases where there is a retrospective change in Ratable Value or other changes in circumstances that could increase the award.
  - f. All awards must be made by 30<sup>th</sup> September 2022
36. All Somerset authorities are currently working with the other Somerset Authorities to align policies on the % of relief to be awarded, and seeks to delegate the authority to approve the final scheme to the Director of Service Delivery and Executive Portfolio Holder for finance.
37. The CARF scheme is likely to amount to subsidy (formerly known as State Aid). Any relief provided by SSDC under this scheme will need to comply with the UK's domestic and international subsidy control obligations. In those cases where it is clear to SSDC that the ratepayer is likely to breach the cash cap or the subsidy rules, we will automatically withhold relief.

### **Transitional Relief (TR) and Supporting Small Business Scheme (SSB)**

38. The TR and SSB reliefs will restrict increases in bills to 15% for businesses with small properties (up to and including £20,000 rateable value) and 25% for medium properties (up to and including £100,000 rateable value).
39. As this is a temporary measure for 2022/23 the government is not changing the legislation around transitional relief. Instead, the government will reimburse the Council if it uses its discretionary relief powers under section 47 of the Local Government Finance Act 1988 to grant relief.
40. This policy does not apply to those in downward transition to lower bills, those will fall to their full bill on 1 April 2022.
41. The SSB scheme will be assumed to remain as it is in the Council's current scheme (for periods up to 31 March 2022) with a percentage cap in 2022/23 of 15% plus inflation or a cash value increase of £600 if greater.
42. Where the ratepayer would have been in receipt of both TR and SSB in respect of 2022/23, a single award of section 47 relief resulting in a chargeable amount equivalent to that had the original TR and SSB schemes continued will be allowed.
43. Under the statutory transition scheme which ends on 31 March 2022, TR is measured before all other reliefs. But the extension of TR and SSB into 2022/23 will be delivered via s47 Local Government Finance Act 1998 and will therefore be measured after other reliefs (including other funded reliefs granted such as Retail, Hospitality and Leisure relief and CARF relief).



## **South Somerset District Council**

44. The TR and SSB schemes are likely to amount to subsidy (formerly known as State Aid). Any relief provided by SSDC under this scheme will need to comply with the UK's domestic and international subsidy control obligations. In those cases where it is clear to SSDC that the ratepayer is likely to breach the cash cap or the subsidy rules, we will automatically withhold relief.

### **Public Lavatory Relief (Mandatory)**

45. At the 2018 Budget the Chancellor announced a mandatory business rate relief for public lavatories. The Non-Domestic Rates (Public Lavatories) Bill 2021 received royal assent in late 2021.
46. The relief applies retrospectively from 1 April 2020
47. This is a mandatory relief it, therefore can be awarded to ourselves and to other precepting authorities such as town and parish councils and the county council.
48. The relief will not apply to toilets of a larger unit of ratable property, for example toilets in public libraries. It amends Part 3 of the Local Government Finance Act 1988 to ensure that, in relation to an eligible hereditament which consist wholly or mainly of a public lavatory the chargeable amount will be zero. This provides, in effect a 100% mandatory relief for eligible public lavatories.

### **Discretionary Business Rates Relief Policy**

49. The previous agreed policy on mandatory and discretionary relief remains unchanged, however the section on retail reliefs has been updated to reflect current government guidance for Retail, Hospitality and Leisure Relief.
50. The policy has been updated in conjunction with ACS Consulting services, experts in the provision of professional support and advice to revenues teams across England and Wales and now reflects and accurate position of current and future reliefs available.

### **Financial Implications**

51. Retail, Hospitality and Leisure Relief is fully funded by Central Government.
52. SSDC will only receive a maximum of £3,021,815 in reimbursement for the CARF relief and therefore the scheme will be carefully devised so not to overspend with extensive modelling.
53. Mandatory reliefs (public lavatories) are fully funded by government.

### **Legal implications (if any) and details of Statutory Powers**

54. Relevant Legislation



# South Somerset District Council

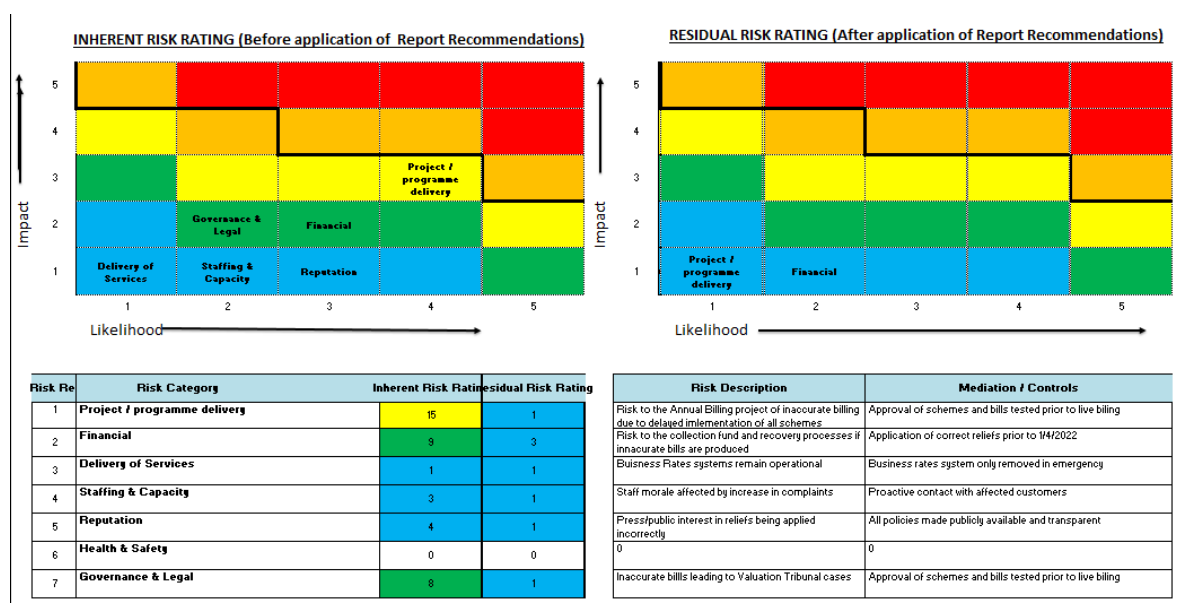
- a. Local Government Finance Act 1988
- b. The Non-Domestic Rates (Public Lavatories) Act 2021

## 55. Official Guidance Documents

- a. [2022/23 Retail, Hospitality and Leisure Relief Scheme: local authority guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/2022-23-retail-hospitality-and-leisure-relief-scheme-local-authority-guidance)
- b. [COVID-19 Additional Relief Fund \(CARF\): local authority guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/covid-19-additional-relief-fund-carf-local-authority-guidance)
- c. [Guidance on the UK's international subsidy control commitments - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/guidance-on-the-uk-s-international-subsidy-control-commitments)

## Risk Matrix

The risk matrix shows risk relating to the Council Plan headings.



## Council Plan Implications

- 56. Council Plan – Priority 1 - *Lead the recovery and revitalisation of our economy and communities to be stronger, more resilient and more vibrant than before Covid-19*
  - a. Desired Outcome – to provide support to businesses adversely impacted by the Covid 19 pandemic

## Carbon Emissions and Climate Change Implications

None

## Equality and Diversity Implications



## South Somerset District Council

<i>An Equality Impact Relevance Check Form has been completed in respect of the Proposal?</i>	Yes / <del>No</del>
<i>The Impact Relevance Check indicated that a full EIA was required?</i>	<del>Yes</del> / No
<i>If an EIA was <b>not</b> required please attach the Impact Relevance Check Form as an Appendix to this report and provide a brief summary of its findings in the comments box below.</i>	
<i>If an EIA <b>was</b> required please attach the completed EIA form as an Appendix to this report and provide a brief summary of the result of your Equality Impact Assessment in the comment box below.</i>	
<b>Additional Comments</b>	

### Privacy Impact Assessment

57. Consideration has been given to the Privacy impact assessment. Letters will need to be sent to those businesses identified as qualifying for any discretionary relief giving them an opt-out option when they self-declare that they will not qualify. This is also necessary under s47 Local Government Finance Act 1988 to give twelve months' notice of the end date of the relief.
58. As this information is being used for its intended purpose of processing Business Rates accounts and is largely the information of companies as opposed to individuals, the privacy impact is low. A privacy statement will be included on our website on the appropriate pages and on any letters sent out.

### Background Papers

59. The following background papers can be viewed on the council website
- Report to District Executive – March 2017 – item 8
  - Report to District Executive – April 2017 – item 8
  - Report to District Executive – March 2018 – item 8
  - Report to District Executive – January 2019 – item 12
  - Report to District Executive – March 2020 – item 9



**Policy Name: Discretionary Non-Domestic Rates Relief**

Version:	1.0
Service:	Service Delivery
Author:	Alison Hann – Principal Revenues
Review Date:	February 2022



**Contents**

1.0	Purpose of the Policy	5
2.0	Mandatory Relief - Legislative Background	6
	Charity Relief	6
	Rural Rate Relief	6
3.0	Discretionary Relief – Legislative Background	7
	Introduction	7
	The Council’s general approach to granting Discretionary Relief	8
4.0	Effect on the Council’s Finances	9
5.0	Administration of Discretionary Relief	11
	Applications and Evidence	11
	Granting of relief	11
	Variation of a decision	12
6.0	Scheme of Delegation	13
	Granting, Varying, Reviewing and Revocation of Relief	13
	Reviews	13
	Appeals	13
7.0	Reporting changes in circumstances	13
8.0	Fraud	14
	Appendix A	15
	Discretionary Relief – Mandatory Relief recipients	16
	General Explanation	16
	Charity registration	16
	Use of Premises – wholly or mainly used	17
	Offices, administration and similar premises	17
	Charity shops	17
	Granting of Mandatory Relief - the Council’s Policy	18
	Charity Relief – Mandatory Relief recipients, the Council’s Policy for granting discretionary relief.	18
	Appendix B	23
	Discretionary Relief – Non-Profit Making Organisations including Recreation	24
	General explanation	24
	Definition of Recreation	25
	Access to clubs	25
	Provision of facilities	26
	Discretionary Relief - Non–Profit Organisations including Recreation – the Council’s Policy	26
	Appendix C	28
	Discretionary Relief - Rural Rate Relief – Mandatory Relief recipients	29
	What are the qualifying criteria for Mandatory Relief?	29
	What is the definition of a General Store?	29
	What is the definition of a Public House?	30
	What is the definition of a Petrol Filling Station?	30
	What is the definition of a Food Shop?	30
	What are the qualifying criteria for Discretionary Relief?	30





---

Rural Rate Relief – Mandatory Relief recipients, the Council’s Policy for granting discretionary relief. ....	30
Appendix D .....	31
Discretionary Relief – Premises within Rural Settlements .....	32
Benefit to the local community .....	32
Rural Rate Relief – the Council’s Policy for granting discretionary relief. ....	32
Appendix E.....	34
Discretionary Relief – Localism Act 2011.....	35
General explanation .....	35
Discretionary Relief – Localism – the Council’s Policy .....	35
Appendix F.....	37
Local Newspaper Relief .....	37
General Explanation .....	38
Eligibility criteria .....	38
Local Newspapers.....	38
Office Space.....	38
Amount of Relief .....	38
Local Newspaper Relief – the Council’s policy for granting discretionary relief. ....	38
Appendix G .....	39
Supporting Small Businesses Relief .....	39
General Explanation .....	40
Who is eligible for the relief and how much relief will be available?.....	40
Recalculation of relief.....	41
Other Reliefs .....	41
Supporting Small Businesses Relief – the Council’s policy for granting discretionary relief. ....	42
Appendix H .....	43
Expanded Retail Discount Scheme (2021/22) .....	43
General Explanation .....	44
Who is eligible for the relief? .....	44
The Closed Cash Cap.....	47
How much relief will be available?.....	47
The calculation and the cash caps .....	48
Expanded Retail Discount – the Council’s policy for granting discretionary relief..	49
Appendix I.....	50
Retail Hospitality and Leisure Business Rates Scheme (2022/23) .....	50
General Explanation .....	51
Who is eligible for the relief? .....	51
How much relief will be available?.....	51
The cash cap and subsidy control.....	52
Eligibility for the Retail, Hospitality and Leisure Relief Scheme .....	53
Retail Hospitality and Leisure Business Rates Scheme (2022/23) - the Council’s policy for granting discretionary relief. ....	55
Appendix J .....	56
Nursery Discount Scheme (2021/22).....	56
General Explanation .....	57
Who is eligible for the relief? .....	57



---

How much relief will be available? .....	57
The calculation and the cash caps .....	58
Nursery Discount Scheme – the Council’s policy for granting discretionary relief..	58
Appendix K.....	59
Transitional Relief & Supporting Small Business Rates Relief (2022/23).....	59
General Explanation .....	60
How will the relief be provided? .....	60
Who is eligible for the relief? .....	60
How much relief will be available? .....	60
Subsidy control .....	61
Recalculations of relief .....	62
Calculating the extension of transitional relief and SSB where other reliefs apply.	62
Transitional Relief & Supporting Small Business Rates Relief (2022/23) - the Council’s policy for granting discretionary relief.....	62



## **1.0 Purpose of the Policy**

- 1.1 The purpose of this policy is to determine the level of discretionary relief and related areas to be granted to certain defined ratepayers within the Council's area. The policy includes all changes effective from 1<sup>st</sup> April 2022 and includes all extended reliefs due to the COVID-19 crisis and the Government specified reliefs due to the delay in the revaluation. The Council is keen to support businesses as far as possible.
- 1.2 The Local Government Finance Act 1988 and subsequent legislation requires the Council to grant mandatory relief for premises occupied by Charities and similar organisations that own or occupy them wholly or mainly for charitable purposes. Likewise, certain premises situated within a rural settlement area will be eligible for mandatory relief. Powers have also been granted under the Localism Act 2011, which allow for the granting of discretionary rate relief to any premises where the Council feels the granting of such relief would be of benefit to the local community.
- 1.3 In addition to the above, Central Government is keen that in certain cases, assistance will be provided to businesses who have had increases in their rate liability due to the revaluation of premises in April 2017 or have been affected by the COVID-19 crisis. In these cases, and where the Council meets Central Government guidelines, grants are available under section 31 of the Local Government Act 2003.
- 1.4 Whilst the Council is obliged to grant relief to premises, which fall within the mandatory category, the Council also has powers to grant discretionary relief and reductions to ratepayers, subject to certain criteria being met. In the case of the new reliefs, some guidance has been issued by Central Government outlining actions expected to be taken by local authorities. This policy includes Government guidance where appropriate but also looks to target discretionary relief in line with the Council's priorities.
- 1.5 This document outlines the following areas:
  - Details of the criteria for receiving Discretionary Reliefs for all relevant areas;
  - The Council's policy for the granting of all types of Discretionary Reliefs;
  - Guidance on granting and administering the reliefs and awards; and
  - The Council's Scheme of Delegation.
- 1.6 Where organisations apply for relief they will be granted (or not granted) relief or reductions in line with the following policy.



## **2.0 Mandatory Relief - Legislative Background**

### **Charity Relief**

- 2.1 The powers relating to the granting of mandatory<sup>1</sup> and discretionary relief are given to the Council under the Local Government Finance Act 1988<sup>2</sup>. Charities and Trustees for Charities are only liable to pay one fifth of the Non-Domestic Rates that would otherwise be payable where property is occupied and used wholly or mainly for charitable purposes. This amounts to mandatory relief of 80%. For the purposes of the Act, a charity is an organisation or trust established for charitable purposes, whether or not it is registered with the Charity Commission. The provision has been extended under the Local Government Act 2003 (effective from 1<sup>st</sup> April 2004) to registered Community Amateur Sports Clubs (CASCs). Full details of the mandatory provisions are given later within this policy.
- 2.2 In the case of charity shops, the premises must meet the criteria laid down by section 64 (10) of the Local Government Finance Act 1988 which states that the premises are to be treated as used for charitable purposes at any time it is wholly or mainly used for the sale of goods donated to the charity and the proceeds of goods (after any deductions for expenses) are applied for the purpose of the charity.
- 2.3 The Council has discretion to grant relief of up to a further 20% for these mandatory cases under its discretionary provisions.

### **Rural Rate Relief**

- 2.4 From 1<sup>st</sup> April 1998, under powers originally granted to the Council by the Local Government and Rating Act 1997<sup>3</sup>, certain types of business in rural settlements, with a population below 3000 may qualify for mandatory rate relief of 50 per cent. Businesses that qualify for this relief are the sole general store and the sole post office in the settlement, provided it has a Rateable Value of up to £8500; any food shop with a Rateable Value of up to £8500; and the sole pub and the sole petrol station in the settlement provided it has a Rateable Value of up to £12500.
- 2.5 From 1<sup>st</sup> April 2017 onwards, Central Government has indicated that it wants all authorities to give 100% relief to premises that receive mandatory rural rate relief. The legislation enabling this will not be forthcoming until 2020 and therefore it has indicated that where the additional 50% is granted, a section 31 grant will be made available to the Council. This is dealt with further within this policy and the Council will automatically grant the additional 50% discretionary relief where appropriate.

<sup>1</sup> S43 & S45 Local Government Finance Act 1988

<sup>2</sup> S47 & S48 Local Government Finance Act 1988

<sup>3</sup> LGFA 1988, s.47, as amended by Sch. 1 to the Local Government and Rating Act 1997



- 2.6 Where businesses in rural settlements have a Rateable Value of up to £16,500 and are not in receipt of mandatory relief, the Council may decide to give up to 100 per cent discretionary relief if it is satisfied that the business is of benefit to the community and having regard to the interests of its Council Taxpayers.

### **3.0 Discretionary Relief – Legislative Background**

#### **Introduction**

- 3.1 The original purpose of discretionary relief was to provide assistance where the property does not qualify for mandatory relief, or to ‘top’ up cases where ratepayers already receive mandatory relief.
- 3.2 Over recent years and particularly since 2011, the discretionary relief provisions have been amended to allow authorities the flexibility to provide more assistance to businesses and organisations.
- 3.3 The range of bodies, which are eligible for discretionary rate relief, is wide and not all of the criteria laid down by the legislation will be applicable in each case.
- 3.4 Unlike mandatory relief, ratepayers are obliged to make a written application to the Council. The Council will expect all businesses to make applications in such a format as is required (which may vary from time to time) and for the business to provide such information and evidence as required in order to determine whether relief should be awarded.
- 3.5 The Council is obliged to consider carefully every application on its merits, taking into account the contribution that the organisation makes to the amenities within the authority’s area. There is no statutory appeal process or Tribunal against any decision made by the Council although, as with any decision of a public authority, decisions can be reviewed by Judicial Review. The authority will however, upon request, review decisions made. Details of the internal review process are given within this policy.
- 3.6 Granting of the relief falls broadly into the following categories:
- (a) Discretionary Relief – Charities who already receive mandatory relief.
  - (b) Discretionary Relief – Premises occupied by organisations not established or conducted for profit whose main objects are charitable or are otherwise philanthropic or religious or concerned with education, social welfare, science, literature or the fine arts **or** premises occupied by organisations not established or conducted for profit and wholly or mainly used for purposes of recreation;
  - (c) Discretionary Relief – Rural Rate Relief - premises that already receive mandatory relief;



- (d) Discretionary Relief – Rural Rate Relief - premises not receiving mandatory relief but of benefit to the local community and less than £16,500 RV;
- (e) Discretionary Relief – Granted under the Localism Act 2011 provisions;
- (f) Local Newspaper Relief (from 1<sup>st</sup> April 2017 until 2025);
- (g) Supporting Small Businesses Relief (from 1<sup>st</sup> April 2017 for a period of five years or until business pay their full rate charge or their transitional rate charge (calculated in accordance with the Non-Domestic Rating (Chargeable Amounts) (England) Regulations 2016));
- (h) Expanded Business Rates Discount Relief (from 1<sup>st</sup> April 2021 for a period of one year)
- (i) Expanded Business Rates Discount Relief (from 1<sup>st</sup> April 2022 for a period of one year);
- (j) Nursery Discount (from 1<sup>st</sup> April 2021 for a period of one year); and
- (k) Transitional Relief and Supporting Small Business Rate Relief (from 1<sup>st</sup> April 2022).

3.7 The decision to grant or not to grant discretionary relief is a matter purely for the Council.

### **The Council's general approach to granting Discretionary Relief**

- 3.8 In deciding which organisations should receive discretionary rate relief, the Council has considered the following factors and priorities:
- (a) Provide assistance when there is evidence of financial need;
  - (b) The policy should support business, charities, organisations and groups that help to retain services in rural areas;
  - (c) Help and encourage business, charities, organisations, groups and communities to become self-reliant;
  - (d) Awarding discretionary relief should not distort competition; and
  - (e) Every business/ organisation should contribute something towards the provision of local services; and
  - (f) Since March 2020, provide assistance to ratepayers suffering from the effects of the COVID-19 crisis.
- 3.9 Where any reduction or remission is granted to a ratepayer under S49 Local Government Finance Act 1988 (where hardship is proven to the Council), then there will be no requirement to grant Discretionary Rate Relief for that amount.
- 3.10 In certain cases, the order in which relief is granted is specified. Mandatory relief shall be granted in all cases where the criteria is met irrespective of whether discretionary relief can be granted or not.

## The Council's approach to granting Government led Discretionary Relief schemes

3.11 Over the past few years, a number of schemes have been led by Central Government but without specific legislative changes. These are administered under S47 of the Local Government Finance Act 1988 and guidance is often provided. The Council is keen to support such initiatives especially where they are designed to help local businesses and will look to maximise both the reliefs given as well as maximise any grants receivable. However, the Council reserves the right to vary its approach where thought appropriate.

### 4.0 Effect on the Council's Finances

4.1 The granting of discretionary relief will, in the main, involve a cost to the Council. Since the change to the funding for Non-Domestic Rating in April 2013, the effect of the relief is complex.

4.2 Any amounts granted prior to 1<sup>st</sup> April 2013 and continuing since that date will be included in the Council's baseline within the Business Rates Retention Scheme. For any amounts granted for similar cases after 1<sup>st</sup> April 2019, the costs of the relief will be borne in accordance with the Business Rates Retention Scheme share namely 50% borne by Central Government, 40% by the Council and 10% by Somerset County Council. This also applies where mandatory relief is granted.

4.3 Where Central Government leads an initiative, grants are often available through section 31 of the Local Government Act 2003. This is not automatic and Central Government will look to the Council to adopt the recommended approach when granting in these areas

4.4 The financial effects of discretionary reliefs covered by this policy are as follows

Appendix	Relief Type	Granted after 1 <sup>st</sup> April 2022
	<b>Charity Relief</b>	
A	Discretionary relief granted to Mandatory Relief recipients	40% borne by the Council
B	Non-profit Making Organisations including Sports Clubs and societies	40% borne by the Council
	<b>Rural Rate Relief</b>	
C	50% Discretionary relief granted to Mandatory Rural Relief recipients	Section 31 Grant



D	Other premises within a rural settlement under £16500 RV	40% borne by the Council
	<b>Localism</b>	
E	Discretionary Relief granted to ratepayers generally and not covered by any other section	40% borne by the Council
	<b>Local Newspaper Relief</b>	
F	Discretionary Relief granted to local newspapers meeting the criteria (From 1 <sup>st</sup> April 2017 until 2025)	Section 31 Grant
	<b>Supporting Small Business Relief</b>	
G	Supporting Small Businesses Relief (from 1 <sup>st</sup> April 2017 for a period of up to five years if conditions are met.	Section 31 Grant
	<b>Expanded Business Rates Discount Relief (2021/22)</b>	
H	Expanded Business Rates Discount Relief (from 1 <sup>st</sup> April 2021 for a period of one year)	Section 31 Grant
	<b>Expanded Business Rates Discount Relief (2022/23)</b>	
I	Expanded Business Rates Discount Relief (from 1 <sup>st</sup> April 2022 for a period of one year)	Section 31 Grant
	<b>Nursery Discount</b>	
J	Nursery Discount (from 1 <sup>st</sup> April 2021 for a period of one year)	Section 31 Grant
	<b>Transitional Relief &amp; Supporting Small Business Rates Relief (2022/23)</b>	
K	Transitional Relief and Supporting Small Business Rates Relief (from 1 <sup>st</sup> April 2022 for a period of one year)	Section 31 Grant





## **5.0 Administration of Discretionary Relief**

- 5.1 The following section outlines the procedures followed by officers in granting, amending, or cancelling discretionary relief and reduction. This is essentially laid down by legislation<sup>4</sup>

### **Applications and Evidence**

- 5.2 All reliefs must be applied for. Application forms (where required) are available both in hard copy and electronic format. The relevant application forms are available from the Council. The Council will specify how applications are to be received and this may vary from time to time.
- 5.3 Organisations are required to provide a completed application form plus any such evidence, documents, accounts (normally the last two years), financial statements etc. necessary to allow the Council to make a decision. Where insufficient information is provided, then no relief will be granted. In some cases, it may be necessary for officers to visit premises and we would expect organisations claiming relief to facilitate this where necessary.
- 5.4 Applications should initially be made to the Revenues and Benefits Service and will be determined in accordance with this policy.
- 5.5 **The Council will provide this service and provide guidance free of charge. Ratepayers are encouraged to approach the Council direct and NOT pay for such services through third parties. Applications will be accepted from ratepayers only.**

### **Granting of relief**

- 5.6 In all cases, the Council will notify the ratepayer of decisions made.
- 5.7 Where an application is successful, then the following will be notified to them in writing:
- The amount of relief granted and the date from which it has been granted;
  - If relief has been granted for a specified period, the date on which it will end. (It should be noted that reliefs are granted for the period specified in the appropriate Appendix and may vary from a day to a full financial year);
  - The new chargeable amount;
  - The details of any planned review dates and the notice that will be given in advance of a change to the level of relief granted; and
  - A requirement that the applicant should notify the Council of any change in circumstances that may affect entitlement to relief.

---

<sup>4</sup> The Non-Domestic Rating (Discretionary Relief) Regulations 1989



- 5.8 Where relief is not granted, then the following information is provided, again in writing:
- An explanation of the decision within the context of the Council's statutory duty; and
  - An explanation of the appeal rights (see below).
- 5.9 Discretionary relief is to be granted from the beginning of the financial year in which the decision is made or when liability begins whichever is the later. Since 1997 decisions can be made up to 6 months after the end of the financial year for which the application was made. In such cases, the Council *may* backdate its decision.
- 5.10 A decision to award discretionary relief and how much relief is given is normally only applicable to the financial year for which the application is made. However, the Council reserves the right to grant relief for any other period as appropriate.
- 5.11 A fresh application for discretionary relief will be necessary for each financial year **or** at such time-period as the Council determines.

### **Variation of a decision**

- 5.12 Variations in any decision will be notified to ratepayers as soon as practicable and will take effect as follows:
- Where the amount is to be increased due to a change in rate charge (excluding rateable value increases) or a change in the Council's decision which increases the award – this will apply from a date determined by the Council as appropriate;
  - Where the amount is to increase for any other reason, it will take effect at the expiry of a financial year unless it is granted for a fixed period;
  - Where the amount is to be reduced due to a reduction in the rate charge or liability including any reduction in rateable value, awarding of another relief or exemption this will apply from the date of the decrease in rate charge; and
  - Where the amount is to be reduced for any other reason, it will take effect from a date determined by the Council as appropriate;
- 5.13 A decision may be revoked at any time however; a one-year period of notice will be given, and the change will take effect at the expiry of a financial year.



## **6.0 Scheme of Delegation**

### **Granting, Varying, Reviewing and Revocation of Relief**

- 6.1 All powers in relation to reliefs are given under the Local Government Finance Act 1988, the Local Government and Rating Act 1997, the Local Government Act 2003 and the Localism Act 2011. However section 223 of the Local Government Act 1992 allows for delegation of decisions by the Council to Cabinet, Committees, Sub-Committees or Officers.
- 6.2 The Council's scheme of delegation allows for the Revenues Specialist to award, revise or revoke any discretionary relief applications. However, any application which is considered to be of a significant nature, will be subject to consultation with the Council's Section 151 Officer, prior to final determination.
- 6.3 Applications that are refused will, on request, be reconsidered if additional supporting information is provided or the refusal is subsequently considered to be based on a misinterpretation of the application.

### **Reviews**

- 6.4 The policy for granting relief will be reviewed annually or where there is a substantial change to the legislation or funding rules. At such time, a revised policy will be brought before the relevant committee of the Council.

### **Appeals**

- 6.5 Where the Council receives an appeal from the ratepayer regarding the granting, non-granting or the amount of any discretionary relief, the case will be reviewed by the Revenues Specialist. Where a decision is revised then the ratepayer shall be informed, likewise if the original decision is upheld.
- 6.6 Where the ratepayer wishes to appeal the decision of the Revenues Specialist Manager, the case will be considered by the Council's Section 151 Officer or Relevant Service Director whose decision on behalf of the Council will be final.
- 6.7 Ultimately the formal appeal process for the ratepayer is Judicial Review although the Council will endeavour to explain any decision fully and openly with the ratepayer.

## **7.0 Reporting changes in circumstances**

- 7.1 Where any award is granted to a ratepayer, the Council will require any changes in circumstances which may affect the relief, to be reported as soon as possible or in any event within 21 days of the change. This will be important where the change would result in the amount of the award being reduced or cancelled e.g. where



the premises comes unoccupied or is used for a purpose other than that determined by the Council as eligible for relief.

- 7.2 Where a change of circumstances is reported, the relief will, if appropriate, be revised or cancelled as appropriate. Where any award is to be reduced, the Council will look to recover the amount from the date the change of circumstances occurred.

## **8.0 Fraud**

- 8.1 Where a ratepayer falsely applies for any relief, or where the ratepayer provides false information, makes false representation, or deliberately withholds information in order to gain relief, prosecutions will be considered under the Fraud Act 2006.



**Appendix A**  
**Discretionary Relief – Mandatory Relief recipients**



---

## Discretionary Relief – Mandatory Relief recipients

### General Explanation

- A.1 S43 of the Local Government Finance Act 1988 allows mandatory relief (80%) to be granted on premises if the ratepayer is a charity or trustees for a charity and the premises are wholly or mainly used for charitable purposes. No charge is made in respect of unoccupied premises where it appears that *when next in use* it will be used wholly or mainly for those purposes.
- A.2 The legislation has been amended by the Local Government Act 2003 (effective from 1<sup>st</sup> April 2004) to include registered<sup>5</sup> Community Amateur Sports Clubs (CASC). These organisations can now receive the mandatory (80%) relief.

### Charity registration

- A.3 Charities are defined within the legislation as being an institution<sup>6</sup> or other organisation established for charitable purposes only or by persons administering a trust established for charitable purposes only.
- A.4 The question as to whether an organisation is a charity may be resolved in the majority of cases by reference to the register of charities maintained by the Charity Commissioners under s.4 of the Charities Act 1960. Entry in the register is conclusive evidence. By definition, under the Non-Domestic Rating legislation, there is no actual need for an organisation to be a registered charity to receive the relief and this has been supported by litigation<sup>7</sup>, however in all cases the organisation must fall within the following categories:
- trusts for the relief of poverty;
  - trusts for the advancement of religion;
  - trusts for the advancement of education; and
  - trusts for other purposes beneficial to the community, but not falling under any of the preceding heads.
- A.5 Certain organisations are exempted from registration generally and are not required to make formal application to the Charity Commissioners these are:
- the Church Commissioners and any institution administered by them;
  - any registered society within the meaning of the Friendly Societies Acts of 1896 to 1974;
  - units of the Boy Scouts Association or the Girl Guides Association; and
  - voluntary schools within the meaning of the Education Acts of 1944 to 1980.

---

<sup>5</sup> Registered with HMRC as a CASC

<sup>6</sup> S67(10) Local Government Finance Act 1988

<sup>7</sup> Income Tax Special Commissioners v Pemsell (1891)



- A.6 The Council will consider charitable organisations, registered or not, for mandatory relief.

### **Use of Premises – wholly or mainly used**

- A.7 Irrespective of whether an organisation is registered as a charity or not, the premises **must** be wholly or mainly used for charitable purposes. This is essential if any relief (either mandatory or discretionary) is to be granted. In most cases this can be readily seen by inspection, but on occasions the Council has had to question the actual use to which the premises are to be put. In some cases, it will be necessary for the Council to inspect any premises fully.
- A.8 Guidance from the Department of Communities and Local Government (DCLG) has stated that in the case of ‘mainly’, at least 51% must be used for charitable purposes whether of that charity or of that and other charities
- A.9 The following part of this section gives details on typical uses where relief may be given plus additional criteria that have to be satisfied. The list is not exhaustive but gives clear guidance on premises for which mandatory relief can be granted *and therefore* premises which may be equally considered for discretionary rate relief.

### **Offices, administration and similar premises**

- A.10 Premises used for administration of the Charity include:
- Offices;
  - Meeting Rooms; and
  - Conference Rooms.

### **Charity shops**

- A.11 Charity shops are required to meet additional legislative criteria if they are to receive mandatory relief. Section 64 (10) of the Local Government Finance Act 1988 provides that a property is to be treated as being wholly or mainly used for charitable purposes at any time if, at the time, it is wholly or mainly used for the sale of goods donated to a charity and the proceeds of the sale of the goods (after any deduction of expenses) are applied for the purposes of the charity.
- A.12 In order to ascertain whether an organisation meets these requirements, inspections may be made by an officer of the Council when an application is received



## **Granting of Mandatory Relief - the Council's Policy**

- A.13 Where the criteria for awarding mandatory relief are met, the rate charges shall be calculated in accordance with the legislation reducing the liability of ratepayers for each day that the criteria are met.

### **Charity Relief – Mandatory Relief recipients, the Council's Policy for granting discretionary relief.**

- A.14 The Council has resolved to grant the following discretionary relief where the applicants already receive mandatory charity relief:
- .



	Organisation	Mandatory Relief	Criteria	Situated within a Rural Settlement	Amount of Discretionary Relief
1	Village Halls, Community centres and meeting rooms with charitable status	80%	Where helping to achieve the ambitions of the Council plan and related strategies	N/A	10%
			Where helping to achieve the ambitions of the Council plan or related strategies/policies <b>or</b> where it is helping to retain services in rural areas	N/A	20%
2	Scout, Guide and Youth Organisations with charitable status	80%	Where helping to achieve the ambitions of the Council plan and related strategies	N/A	10%
			Where helping to achieve the ambitions of the Council plan or related strategies/policies <b>or</b> where it is helping to retain services in rural areas	N/A	20%
3	Pre-Schools/ Play Groups and Nurseries	80%	Where helping to achieve the ambitions of the Council plan and related strategies	N/A	10%
			Where helping to achieve the ambitions of the Council plan or related strategies/policies <b>or</b> where it is helping to retain services in rural areas	N/A	20%
4	Schools/education & Academy's with charitable status, including private schools	80%		N/A	Nil

	Organisation	Mandatory Relief	Criteria	Situated within a Rural Settlement	Amount of Discretionary Relief
5	Local charity office	80%	Where solely an administration office	N/A	Nil
			Where Charitable service is also delivered from same premises	N/A	10%
			Where the charitable service is being delivered from the same premises and the work of the organisation helps SSDC meet its Council Plan and objectives to such an extent that if the organisation did not operate SSDC would have to do the work or contract another provider	N/A	20%
6	Local Charity Shop	80%		N/A	Nil
7	National charity shop	80%		N/A	Nil
8	National Charity Administration office	80%		N/A	Nil
9	Sports Clubs/recreational facilities (with charity status)	80%	Where there is a bar offering alcohol at discounted or reduced prices to its members or the general public	N/A	Nil
			Where the bar is ancillary and is not offering discounted alcohol or there is no bar, and the criteria below are not fulfilled.	N/A	10%
			Where: <ul style="list-style-type: none"> <li>• there is no bar; and</li> <li>• The club / facilities are open to all; and</li> </ul>	N/A	20%

	Organisation	Mandatory Relief	Criteria	Situated within a Rural Settlement	Amount of Discretionary Relief
			<ul style="list-style-type: none"> <li>Satisfies community need; and</li> <li>Is run by a committee – that is constitutionalised and operates under good governance.</li> </ul>		
10	Community Amateur Sports Club (CASC)	80%	Where there is a bar offering alcohol at discounted or reduced prices to its members or the general public	N/A	Nil
			Where the bar is ancillary and is not offering discounted alcohol or there is no bar and the criteria below are not fulfilled.	N/A	10%
			Where: <ul style="list-style-type: none"> <li>there is no bar; and</li> <li>The club / facilities are open to all; and</li> <li>Satisfies community need; and</li> <li>Is run by a committee – that is constitutionalised and operates under good governance.</li> </ul>	N/A	20%
11	Hospice/end of life care provider with charitable status	80%		N/A	20%
12	Lifesaving/rescue organisations with Charitable Status	80%	This does not apply to any retail premises. See organisation categories 6 and 7.	N/A	20%
13	Small Museum/Heritage or Arts centre with charitable status	80%	Up to a maximum RV of £50,000	N/A	10%
14	Theatres with charitable status	80%	Up to a maximum RV of £50,000	N/A	10%

	<b>Organisation</b>	<b>Mandatory Relief</b>	<b>Criteria</b>	<b>Situated within a Rural Settlement</b>	<b>Amount of Discretionary Relief</b>
15	Housing Association Offices	80%		N/A	Nil
16	Religious Organisations and groups with charitable status	80%		N/A	Nil
17	Hostel	80%	Where helping to achieve the ambitions of the Council plan and related housing strategies	N/A	20%
18	Stores/warehouses (local and national charities)	80%		N/A	Nil



## **Appendix B**

### **Discretionary Relief – Non-Profit Making Organisations including Recreation**



## **Discretionary Relief – Non-Profit Making Organisations including Recreation**

### **General explanation**

#### **Non-Profit**

- B.1 The legislation<sup>8</sup> allows the Council to grant discretionary relief where the property is not an *excepted* one and all or part of it is occupied for the purposes of one or more institutions or other organisations none of which is established or conducted for profit and each of whose main objects are charitable or are otherwise philanthropic or religious or concerned with education, social welfare, science, literature or the fine arts.
- B.2 Relief cannot be granted to any premises occupied by the Council, or any town, parish council or major Precepting Authority (*excepted premises*).
- B.3 A number of issues arise from the term ‘not established or conducted for profit’. This requires the Council to make enquiries as to the overall purpose of the organisation although if surpluses and such amounts are directed towards the furtherance or achievement of the objects of the organisation then it does not necessarily mean that the organisation was established or conducted for profit.<sup>9</sup>

#### **Recreation Clubs**

- B.4 Ideally all recreation clubs should be encouraged to apply for Community Amateur sports Club (CASC) status, which would automatically entitle them to 80% relief. The relief granted to CASCs is covered earlier within this policy.
- B.5 Recreation clubs can also apply to the Charity Commissioners for registration as a Charity (thereby falling under the mandatory provisions for 80% relief) where they meet the following conditions:
- a. The promotion of community participation in healthy recreation and by the provision of facilities for the playing of particular sports; and
  - b. The advancement of the physical education of young people not undergoing formal education.
- B.6 Where sports clubs do not meet the CASC requirement, and are not registered charities, discretionary relief can be granted (0-100%) where the property is not an *excepted* one, it is wholly or mainly used for purposes of recreation and all or part of it is occupied for the purpose of a club, society or other organisation not established or conducted for profit.

---

<sup>8</sup> S47 Local Government Finance Act 1988



**Definition of Recreation**

B.7 Recreation is clearly defined by the Sports Council as any of the following<sup>10</sup>

Aikido	Croquet	Kabaddi	Real Tennis	Tang Soo Do
American Football	Crossbow	Karate	Roller Hockey	Tenpin Bowling
Angling	Curling	Kendo	Roller Skating	Trampoline
Archery	Cycling	Korfball	Rounders	Triathlon
Arm Wrestling	Disability Sport	Lacrosse	Rowing	Tug of War
Association Football	Dragon Boat	Lawn Tennis	Rugby League	Unihoc
Athletics	Racing	Life Saving	Rugby Union	Volleyball
Australian Rules Football	Equestrian	Luge	Sailing	Water Skiing
Badminton	Fencing	Modern Pentathlon	Sand/Land Yachting	Weightlifting
Balloon	Fives	Motor Cycling	Shinty	Wrestling
Baseball	Flying	Motor Sports	Shooting	Yoga
Basketball	Gaelic Football	Mountaineering	Skateboarding	
Baton Twirling	Gliding	Movement, Dance, Exercise & Fitness	Skiing	
Biathlon	Golf	Netball	Skipping	
Bicycle Polo	Gymnastics	Orienteering	Snowboarding	
Billiards and Snooker	Handball	Parachuting	Softball	
Bobsleigh	Hang/Para	Petanque	Sombo	
Boccia	Gliding	Polo	Wrestling	
Bowls	Highland Games	Pony Trekking	Squash	
Boxing	Hockey	Pool	Skater/Street Hockey	
Camogie	Hovering	Quoits	Sub-Aqua	
Canoeing	Hurling	Racketball	Surf Life Saving	
Caving	Ice Hockey	Rackets	Surfing	
Chinese Martial Arts	Ice Skating	Raquetball	Swimming & Diving	
Cricket	Jet Skiing	Rambling	Table Tennis	
	Ju Jitsu		Taekwondo	
	Judo			

**Access to clubs**

B.8 Guidance issued by the Government also requires the Council to consider access to clubs within the community before granting discretionary relief.

B.9 Membership should be open to all sections of the community. There may be legitimate restrictions placed on membership which relate for example to ability in sport or to the achievement of a standard in the field covered by the organisation or where the capacity of the facility is limited, but in general membership should not be exclusive or restrictive.

<sup>10</sup> Definition last reviewed by Sport England in 2002



- B.10 Membership rates should not be set at such a high level as to exclude the general community. However, membership fees may be payable at different rates that distinguish the different classes of membership such as juniors, adults, students, pensioners, players, non-players, employed and unemployed. In general, the club or organisation must be prepared to show that the criteria by which it considers applications for membership are consistent with the principle of open access.
- B.11 The Council also asks the following question to help establish the level of access 'Does the organisation actively encourage membership from particular groups in the community e.g., young people, women, older age groups, persons with disability, ethnic minorities' etc.?'

### **Provision of facilities**

- B.12 Clubs which provide training or education are encouraged, as are those who provide schemes for particular groups to develop their skills e.g., young people, the disabled, retired people.
- B.13 A number of organisations run a bar. The mere existence of a bar will not in itself be a reason for not granting relief. However, the Council focuses on the main purpose of the organisation. The Council is encouraged to examine the balance between playing and non-playing members.
- B.14 Within this area, the Council also considers whether the facilities provided relieve the Council of the need to do so or enhance and supplement those that it does provide.

### **Discretionary Relief - Non-Profit Organisations including Recreation – the Council's Policy**

- B.15 Applications will be considered from non-profit making organisations, which can demonstrate the following:
- (a) That the activities of the organisation are consistent with the Council's core values and priorities;
  - (b) That they are non-profit making associations, groups, clubs which are accessible to all potential users, possess a representative management group and are clearly accountable to users, beneficiaries and members (e.g., evidence of constitution, membership and/or participation are required); and
  - (c) That the membership comprises mainly residents of South Somerset or that activities are of direct benefit to residents of the district.
- B.16 The current policy is as follows:



Organisation	Mandatory Relief	Criteria	Situated within a Rural Settlement	Amount of Discretionary Relief
1	Community Interest Company (or not for profit)	No	Where helping to achieve the ambitions of the Council plan or related strategies/policies and they operate similar to a charity with minimal costs and reinvest profit in the company. Up to a maximum Rateable Value of £8,500	No 80%
2	Sports Club / Recreational facility	No	Where there is no bar or the bar is ancillary and is not offering discounted alcohol, Rateable Value <b>up to</b> £8,500 (note not charities or CASCs)	No 90%
	Where there is no bar or the bar is ancillary and is not offering discounted alcohol, Rateable Value <b>over</b> £8,500 (note not charities or CASCs)	No		Sliding Scale (see table below)
	Sliding Scale Rateable value band		Level of relief	
	£8,501 to £13,499		80%	
	£13,500 to £18,499		70%	
	£18,500 to £23,499		60%	
	£23,500 to £28,499		50%	
	£28,500 to £33,499		40%	
	£33,500 to £38,499		30%	
	£38,500 to £43,499		20%	
	£43,500 to £49,999		10%	
	£50,000 and over		Nil	
3	Hostels	No	Where helping to achieve the ambitions of the Council plan or related housing strategies/policies.	No



**Appendix C**  
**Discretionary Relief - Rural Rate Relief – Mandatory Relief**  
**recipients**



## **Discretionary Relief - Rural Rate Relief – Mandatory Relief recipients**

### **What are the qualifying criteria for Mandatory Relief?**

- C.1 For a Post Office or General Store to be entitled to 50% Mandatory Relief, all the following criteria must be met:
- The Rateable Value of the property must not exceed £8,500 (from 1 April 2010);
  - The property must be used as a Post Office or a General Store (see below for definition), or both;
  - The property must be the only Post Office or the only General Store within the Rural Settlement.
- C.2 For a Public House or Petrol Filling Station to be entitled to 50% Mandatory Relief, all the following criteria must be met:
- The Rateable Value of the property must not exceed £12,500 from 1 April 2010);
  - The property must be used as a Public House (see below for definition) or a Petrol Filling Station (see below for definition); and
  - The property must be the only Public House or the only Petrol Filling Station within the Rural Settlement.
- C.3 For a village food shop to be entitled to 50% Mandatory Relief, all the following criteria must be met:
- The Rateable Value of the property must not exceed £8,500 from 1 April 2010); and
  - The property must be used as a shop selling mainly food (see below for definition).

### **What is the definition of a General Store?**

- C.4 For the purposes of Rural Rate Relief, 'General Store' means a business or trade, which wholly or mainly sells by retail both food (other than confectionery) for human consumption and general household goods. Where there are two or more General Stores within the same Rural Settlement, none can qualify for Mandatory Relief on that basis, although if one of them functions as a Post Office or a Food Shop relief may be claimed independently on that ground. However, both a General Store and a Post Office in the same Rural Settlement will qualify for Mandatory Relief, provided that, they both meet the criteria. Although a General Store or a Post Office may not meet the criteria for Mandatory Relief, they may still be eligible to apply for Discretionary Relief.



**What is the definition of a Public House?**

- C.5 For the purposes of Rural Rate Relief, 'Public House' means any premises as defined in the Licensing Act 2003, which has a premises license authorising sale by retail of alcohol for consumption on the premises. In addition, the premises must be used principally for retail sales of alcohol to members of the public for consumption on the premises, and sales must not be subject to the condition that buyers reside at or consume food on the premises.

**What is the definition of a Petrol Filling Station?**

- C.6 For the purposes of Rural Rate Relief, 'Petrol Filling Station' means premises where petrol or other automotive fuels are sold retail to the general public for fuelling motor vehicles intended or adapted for use on roads

**What is the definition of a Food Shop?**

- C.7 For the purpose of Rural Rate Relief, 'Food Shop' means a trade or business consisting wholly or mainly of the sale by retail of food for human consumption (excluding confectionery and catering – in this context catering means any supply of food for consumption on the premises on which it is supplied and any supply of hot food for consumption off the premises). This definition may also include shops, which sell mainly household foods and which may partly also sell hot take away food or food consumed on the premises. But shops whose main business is a restaurant, tearoom, take-away, or confectionery sales are not food shops and so will not qualify for mandatory relief.

**What are the qualifying criteria for Discretionary Relief?**

- C.8 The Council may grant up to 50% Discretionary Relief in respect of any property which qualifies for 50% Mandatory Relief and the Council may also grant up to 100% Discretionary Relief to any rural business which does not meet the mandatory provisions. It should be noted that for 2017 onwards Central Government has requested that Council grant 50% discretionary relief to all ratepayers who receive 50% mandatory rural rate relief.

**Rural Rate Relief – Mandatory Relief recipients, the Council's Policy for granting discretionary relief.**

- C.9 As Central Government has requested and fully funds any additional relief granted to ratepayers who receive mandatory rural rate relief, the Council will automatically grant the additional 50% until such time as primarily legislation is changed.



**Appendix D**  
**Discretionary Relief – Premises within Rural Settlements**



---

## **Discretionary Relief – Premises within Rural Settlements**

- D.1 In addition to having the ability to grant discretionary relief to those in receipt of mandatory relief, the Local Government and Rating Act 1997 allows discretionary relief of up to 100% to be granted where the rateable value is £16500 or less and:
- (a) Property is used for purposes which are of benefit to the local community; and
  - (b) It would be reasonable for the billing authority to award relief, having regards to the Council's Council Taxpayers.
- D.2 As with most discretionary relief, part of the cost, is met by Central Government and the balance from local sources.
- D.3 The main criteria for granting discretionary relief in respect of rural rate relief is that premises are used to benefit the local community.

### **Benefit to the local community**

- D.4 Whilst each application for the relief will be considered on its own merits, there are certain factors which weigh heavily in the decision-making process. It is this Council's belief that the spirit of the legislation is to assist businesses and amenities, which contribute significantly to the quality of life of the people who have their main home in the Rural Settlement.
- D.5 To be successful for consideration, a business must show that its existence is a significant benefit to the local community with the majority of local residents directly benefiting from services or facilities provided by that business

### **Rural Rate Relief – the Council's Policy for granting discretionary relief.**

- D.6 The Council will also consider applications for a discretionary rural rate relief from all ratepayers, not entitled to mandatory relief up to the levels in the table below.
- D.7 In determining the application the following matters will be taken into consideration:
- The granting of any discretionary relief will be essential in ensuring the viability of any business within the rural settlement;
  - The granting of any discretionary relief is proportionate given the level of any business rates charged compared with the overall turnover of the business;
  - The granting of any discretionary relief will assist the business in continuing to be viable and / or prevent the business from failing;
  - The business is considered by the Council to be essential to the community and that any reduction or withdrawal of the business will have a serious detrimental effect on the rural settlement;
  - The granting of any discretionary relief is reasonable having regard to the effect on taxpayers of the Council.



	Organisation	Mandatory Relief	Criteria	Situated within a Rural Settlement	Amount of Discretionary Relief
1	Rural Public House, up to £16,500 RV	No	Discretionary relief for the provision of community facilities and activities not provided elsewhere in the community	Yes	20%
			If they can demonstrate they are making significant efforts to help the business succeed	Yes	20%
2	Dentist, hairdresser, up to £16,500 RV	No	Discretionary relief for the provision of community facilities not provided elsewhere in the community	Yes	Up to 50%



**Appendix E**  
**Discretionary Relief – Localism Act 2011**





## **Discretionary Relief – Localism Act 2011**

### **General explanation**

- E.1 Section 69 of the Localism Act 2011 amended Section 47 of the Local Government Finance Act 1988. These provisions allow all Councils to grant discretionary relief in **any** circumstances where it feels fit having regards to the effect on the Council Taxpayers of its area.
- E.2 The provisions are designed to give authorities flexibility in granting relief where it is felt that to do so would be of benefit generally to the area and be reasonable given the financial effect to Council Taxpayers. An example where the Council has granted relief in the past are where premises were affected by flooding.

### **Discretionary Relief – Localism – the Council’s Policy**

- E.3 Applications will be considered from any ratepayer who wishes to apply. However, where a ratepayer is suffering hardship or severe difficulties in paying their rates liability then relief can be granted under the existing provisions as laid down by Section 49 of the Local Government Finance Act 1988. There will be no requirement to grant relief in such cases under the Council’s discretionary relief policy.
- E.4 Any ratepayer applying for discretionary rate relief under these provisions and who does not meet the criteria for existing relief (charities, non-profit making organisations etc.) must meet **all** of the following criteria and the amount of relief granted will be dependent on the following key factors:
- (a) The ratepayer **must not** be entitled to mandatory rate relief (Charity or Rural Rate Relief);
  - (b) The ratepayer **must not** be entitled to Central Government funded reliefs;
  - (c) The ratepayer **must not** be an organisation that could receive relief as a non-profit making organisation or as a sports club or similar;
  - (d) The ratepayer **must** occupy the premises (no discretionary rate relief will be granted for unoccupied premises);
  - (e) The premises and organisation **must** be of *significant* benefit to residents of the Council’s area;
  - (f) The premises and organisation **must** relieve the Council of providing similar facilities;
  - (g) The ratepayer **must**;
    - i. Provide facilities to certain priority groups such as elderly, disabled, minority groups, disadvantaged groups; **or**
    - ii. Provide *significant* employment or employment opportunities to residents of the Council; **or**
    - iii. Provide the residents of the area with such services, opportunities or facilities that cannot be obtained locally or are not provided locally by another organisation;



- (h) The ratepayer **must** demonstrate that assistance (provided by the discretionary rate relief) will be for a *short time only* **and** that any business / operation is financially viable in the medium and long term; **and**
  - (i) The ratepayer **must** show that the activities of the organisation are consistent with the Council's core values and priorities.
- E.5 Where a ratepayer can demonstrate that **all** of the above criteria are met, relief will be considered for initially a short period.



**Appendix F**  
**Local Newspaper Relief**



### **General Explanation**

- F.1 This is a relief that will be awarded until 2025 and the Government is not changing the legislation around the reliefs available to these properties. Central Government will reimburse local authorities that use their discretionary relief powers (under section 47(3)) of the Local Government Finance Act 1988 to grant relief in line with the eligibility criteria set out in this guidance.
- F.2 The Council will be compensated by Central Government through a grant under section 31 of the Local Government Act 2003.

### **Eligibility criteria**

- F.3 The scheme will provide a £1,500 relief for office space occupied by local newspapers up to a maximum of one discount per local newspaper title and per hereditament, per annum.

### **Local Newspapers**

- F.4 The relief is to be specifically for local newspapers and by that, the Council means what would be considered a “traditional local newspaper.” The relief will not be available to magazines.

### **Office Space**

- F.5 The hereditament **must** be occupied by a local newspaper and wholly or mainly used as office premises for journalists and reporters.

### **Amount of Relief**

- F.6 The amount of relief is limited to a maximum of one discount per newspaper title (e.g., per newspaper name) **AND** per hereditament.

### **Local Newspaper Relief – the Council’s policy for granting discretionary relief.**

- F.7 The Council has decided to grant relief strictly in accordance with Central Government guidelines.



**Appendix G**  
**Supporting Small Businesses Relief**



## General Explanation

- G.1 Central Government has increased the thresholds for Small Business Rate Relief from 1 April 2017 to £12,000 for the 100% relief and £15,000 for the tapered relief. They have also allowed rural rate relief to be granted up to 100% using S47 of the Local Government Finance Act 1988 as a top up to the mandatory level of 50%, albeit that the rateable value limits have not been changed in respect of rural hereditaments (see section D of this policy). Unfortunately, despite these changes, some small businesses and businesses in rural areas may lose their entitlement to the relief due to increases in Rateable Value through the revaluation on 1<sup>st</sup> April 2017.
- G.2 The transitional relief scheme (provided under the Non-Domestic Rating (Chargeable Amounts) (England) Regulations 2016 No. 1265) does not provide support in respect of changes in reliefs. Therefore, those ratepayers who have lost some or all of their small business or rural rate relief may face large percentage increases in bills from 1 April 2017.
- G.3 In view of this, Central Government announced that a new scheme of relief would be made available to those ratepayers facing large increases as a result of the loss of small business or rural rate relief due to the revaluation. All authorities are encouraged to grant the relief in accordance with the guidelines laid down by Central Government and if granted strictly in accordance with guidance, the Council will be compensated by Central Government through a grant under section 31 of the Local Government Act 2003.
- G.4 The relief is known as the ‘Supporting Small Businesses Scheme’

## Who is eligible for the relief and how much relief will be available?

- G.5 The Supporting Small Businesses relief will help those ratepayers who as a result of the change in their rateable value at the revaluation are losing some or all of their small business or rural rate relief and, as a result, are facing large increases in their bills.
- G.6 To support these ratepayers, the Supporting Small Businesses relief will ensure that the increase per year in the bills of these ratepayers is limited **to the greater of:**
- (a) a percentage increase per annum. of 5%, 7.5%, 10%, 15% and 15% 2017/18 to 2021/22 all plus inflation ( unlike the transitional relief scheme under the Chargeable Amount regulations). For the first year of the scheme the percentage increase is taken against the bill for 31 March 2017 after small business rate relief or rural rate relief; **or**
  - (b) a cash value of £600 per year (£50 per month).
- G.7 This cash minimum increase ensures that those ratepayers paying nothing or



very small amounts in 2016/17 after small business rate relief are brought into paying something.

- G.8 In the first year of the scheme, this means all ratepayers losing some or all of their small business rate relief or rural rate relief will see the increase in their bill capped at £600. The cash minimum increase is £600 per year thereafter. This means that ratepayers who in 2016/17 paid nothing under small business rate relief and are losing all of their entitlement to relief (i.e. moving from £6,000 rateable value or less to more than £15,000) would under this scheme be paying £3,000 in year 5.
- G.9 The Government has also decided that those on the Supporting Small Businesses relief scheme whose 2017 rateable values are £51,000 or more will not be liable to pay the supplement (1.3p) to fund small business rate relief while they are eligible for the Supporting Small Businesses relief scheme.
- G.10 Ratepayers will remain in the Supporting Small Businesses relief scheme for either 5 years or until they reach the bill they would have paid without the scheme (this would be the charge payable as their true rates payable or the charge calculated under the Non-Domestic Rating (Chargeable Amounts) (England) Regulations 2016).
- G.11 A change of ratepayer will not affect eligibility for the Supporting Small Businesses relief scheme **but** eligibility will be lost if the property falls vacant or becomes occupied by a charity or Community Amateur Sports Club.

### **Recalculation of relief**

- G.12 The amount of relief awarded under the Supporting Small Businesses relief scheme will be recalculated in the event of a change of circumstances including the following:
- This could include, for example, a backdated change to the rateable value or the hereditament; or
  - The awarding of another relief.
- G.13 The Council will, in effect, calculate the award on a daily basis taking into account the above, and the relief will be re-calculated if the rateable value changes.

### **Other Reliefs**

- G.14 Hereditaments eligible for charity or Community Amateur Sports Club relief or hereditaments which are unoccupied are not eligible for Supporting Small Businesses Relief. Likewise, the same principle applies to properties for which a Section 44A certificate has been granted (apportionment of rateable values for partly occupied properties). The presence of a section 44A certificate will not further reduce the bill found under the Supporting Small Business scheme.



G.15 In accordance with Central Government guidelines, all other discretionary reliefs, will be considered **after** the application of Supporting Small Businesses relief.

**Supporting Small Businesses Relief – the Council’s policy for granting discretionary relief.**

G.16 The Council has decided to grant relief strictly in accordance with Central Government guidelines





**Appendix H**  
**Expanded Retail Discount Scheme (2021/22)**



## **General Explanation**

H.1 In response to the coronavirus pandemic (COVID-19), in the Budget on 3rd March 2021, the Government announced that it would provide an extension to the discount granted under the Expanded Retail Discount provisions into the financial year 2021/22 to all those premises that received the discount during 2020/21 and meet the full eligibility criteria

## **Who is eligible for the relief?**

H.2 Properties that will benefit from the relief will be occupied hereditaments that which meet **all** of the following conditions for each chargeable day, namely that they are **wholly or mainly** being used as:

- (a) shops, restaurants, cafes, drinking establishments, cinemas, and live music venues;
- (b) for assembly and leisure; or
- (c) as hotels, guest & boarding premises, and self-catering accommodation,

H.3 The Council considers shops, restaurants, cafes, drinking establishments, cinemas, and live music venues to mean:

### **Hereditaments that are being wholly or mainly used for the sale of goods to visiting members of the public:**

- Shops (such as: florists, bakers, butchers, grocers, greengrocers, jewellers, stationers, off licences, chemists, newsagents, hardware stores, supermarkets, etc);
- Charity shops;
- Opticians;
- Post offices;
- Furnishing shops/ display rooms (such as: carpet shops, double glazing, garage doors);
- Car/caravan show rooms;
- Second-hand car lots;
- Markets;
- Petrol stations;
- Garden centres; and
- Art galleries (where art is for sale/hire)

### **Hereditaments that are being wholly or mainly used for the provision of the following services to visiting members of the public:**

- Hair and beauty services (such as: hairdressers, nail bars, beauty salons, tanning shops, etc)
- Shoe repairs/key cutting;
- Travel agents;
- Ticket offices e.g. for theatre;
- Dry cleaners;
- Launderettes;



- PC/TV/domestic appliance repair;
- Funeral directors;
- Photo processing;
- Tool hire;
- Car hire;
- Employment agencies;
- Estate agents and letting agents; and
- Betting shops.

**Hereditaments that are being wholly or mainly used for the sale of food and/or drink to visiting members of the public:**

- Restaurants;
- Takeaways;
- Sandwich shops;
- Coffee shops;
- Pubs; and
- Bars.

**Hereditaments which are being used wholly and mainly as cinemas**

**Hereditaments that are being used wholly and mainly as live music venues**

- The Council considers that live music venues are hereditaments wholly or mainly used for the performance of live music for the purpose of entertaining an audience. Hereditaments cannot be considered a live music venue for the purpose of business rates relief where a venue is wholly or mainly used as a nightclub or a theatre, for the purposes of the Town and Country Planning (Use Classes) Order 1987 (as amended).
- Hereditaments can be a live music venue even if used for other activities, but only if those other activities:
  - i. are merely ancillary or incidental to the performance of live music (e.g. the sale/supply of alcohol to audience members); or
  - ii. do not affect the fact that the primary activity for the premises is the performance of live music (e.g., because those other activities are insufficiently regular or frequent, such as a polling station or a fortnightly community event).
- There may be circumstances in which it is difficult to tell whether an activity is a performance of live music or, instead, the playing of recorded music. Although the Council would expect this would be clear in most circumstances, guidance on this may be found in Chapter 16 of the statutory guidance issued in April 2018 under section 182 of the Licensing Act 2003.

**Sport and leisure**

- Hereditaments that are being used wholly or mainly for the provision of sport, leisure, and facilities to visiting members of the public (including for the viewing of such activities) including:
  - Sports grounds and clubs
  - Museums and art galleries



- Nightclubs
- Sport and leisure facilities
- Stately homes and historic houses
- Theatres
- Tourist attractions
- Gyms
- Wellness centres, spas, massage parlours
- Casinos, gambling clubs and bingo halls

**Assembly**

- Hereditaments that are being used for the assembly of visiting members of the public;
- Public halls;
- Clubhouses, clubs, and institutions.

**Hotels, guest & boarding premises, and self-catering accommodation**

- The Council considers guest & boarding premises and self-catering accommodation to mean hereditaments where the non-domestic part is being used wholly or mainly for the provision of living accommodation as a business such as:
  - Hotels, Guest and Boarding Houses
  - Holiday homes
  - Caravan parks and sites

H.4 To qualify for the discount the hereditament should be **wholly or mainly** being used for the above qualifying purposes. Hereditaments which are occupied but not wholly or mainly used for the qualifying purpose will not qualify for the relief.

H.5 For the avoidance of doubt, hereditaments which have closed due to the government's advice on COVID-19 but would have otherwise remained open will be treated as occupied for the purposes of this relief.

H.6 It should be noted that the list set out above is not intended to be exhaustive and each case will be considered on its individual merits.

H.7 In line with Government guidance the list below sets out the types of uses that **will not be considered as eligible** for the purpose of this discount.

**Hereditaments that are being used for the provision of the following services to visiting members of the public**

- Financial services (e.g., banks, building societies, cash points, bureaux de change, short-term loan providers);
- Medical services (e.g., vets, dentists, doctors, osteopaths, chiropractors);
- Professional services (e.g., solicitors, accountants, insurance agents/ financial advisers); and
- Post office sorting offices



---

**Hereditaments that are not reasonably accessible to visiting members of the public**

- H.8 In line with the legal restrictions in section 47(8A) of the Local Government Finance Act 1988, Council may not grant the discount to itself or a precepting authority.

**The Closed Cash Cap**

- H.9 In addition to meeting the criteria laid down within the previous paragraphs, consideration will also be given as to whether the ratepayers also meet the 'Closed Cash Cap' provisions as follows:
- (a) Ratepayers that meet the eligibility criteria for the closed cash cap will be ratepayers who for a chargeable day occupy one or more hereditaments whose use on the chargeable day would, based on the law and guidance applicable on 5 January 2021, have meant that the business or activity would have been mandated to close by the government. For the avoidance of doubt, hereditaments which have closed due to the government's response to coronavirus will be treated as occupied for the purposes of the closed cash cap;
  - (b) If, under this eligibility test, a person would have been required to close its main, in-person service but could have adapted its business to operate takeaway, click and collect or online with delivery services, it will be considered closed and be eligible for the closed cash cap because its substantive business would have been mandated to close;
  - (c) In cases where hereditaments would have remained open to provide services that can continue as they are exempt from the regulations (e.g. post office services, food banks etc.) the ratepayer may still be eligible for the closed cash cap, because they would have been unable to provide their main in-person service.
- H.10 The following hereditaments **will not meet** eligibility for the closed cash cap:
- (a) Hereditaments occupied by businesses and other ratepayers that would have been able to conduct their main service because they do not depend on providing direct in-person services from premises and can operate their services effectively remotely (e.g., accountants, solicitors); and
  - (b) Hereditaments whose occupiers may have chosen to close but not been required to.

**How much relief will be available?**

- H.11 Subject to the cash caps, the total amount of government-funded relief available for each property for 2021/22 under this scheme is:
- (a) For chargeable days from 1 April 2021 to 30 June 2021 100% of the chargeable amount: and
  - (b) For chargeable days from 1 July 2021 to 31 March 2022, 66% of the chargeable amount.
- H.12 The relief will be applied after mandatory reliefs and, other discretionary reliefs funded by Section 31 grants from Central Government have been applied,



excluding those where the Council has used its wider discretionary relief powers introduced by the Localism Act, which are not funded by Section 31 grants

- H.13 Subject to the cash cap, the eligibility for the discount and the discount itself will be assessed by the Council and calculated on a daily basis. The following formula should be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the financial year 2021/22:
- Amount of relief to be granted =  $V \times \text{percentage Expanded Retail Discount}$ , where:
  - $V$  is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and any other discretionary reliefs
  - The calculation will be undertaken ignoring any prior year adjustments in liabilities which fall to be liable on the day.
- H.14 Ratepayers that occupy more than one property will be entitled to relief for each of their eligible properties subject to the cash caps explained below.

### **The calculation and the cash caps**

- H.15 No cash caps will apply for the period between 1 April 2021 to 30 June 2021.
- H.16 Under the cash caps, a ratepayer may only receive up to the following cash caps of Expanded Retail Discount in 2021/22 ignoring any relief for the period before 1 July 2021:
- (a) £2 million for ratepayers meeting the eligibility for the closed cash cap test set out above;
  - (b) £105,000 for all other ratepayers
- H.17 No ratepayer can, in any circumstances, exceed the £2 million cash cap across all of their hereditaments in England. Where a ratepayer eligible for the closed cash cap also occupies hereditaments which do not meet the criteria for the closed cash cap and the value of the discount on the closed hereditaments is less than £2 million then they may also claim the discount on other eligible hereditaments but only up to the cap of £105,000 in respect of those other eligible hereditaments. For example, such a ratepayer whose rate bill from 1 July 2021 onwards on hereditaments eligible for the closed cash cap is £1 million and also occupies other eligible hereditaments with a rates bill of £3 million is able to claim up to £1,105,000 in discount from 1 July 2021 onwards (£1million on their closed hereditament and then up to the £105,000 cash cap on their other eligible hereditaments).
- H.18 Where a ratepayer has a qualifying connection with another ratepayer then those ratepayers will be considered as **one** ratepayer for the purposes of the cash caps. A ratepayer shall be treated as having a qualifying connection with another:
- (a) where both ratepayers are companies, and
    - i. one is a subsidiary of the other; or
    - ii. both are subsidiaries of the same company; or



(b) where only one ratepayer is a company, the other ratepayer (the “second ratepayer”) has such an interest in that company as would, if the second ratepayer were a company, result in its being the holding company of the other.

H.19 In those cases where it is clear to the Council that the ratepayer is likely to breach the cash caps, then the Council will automatically withhold the discount. The Council reserves the right to request information from ratepayers to assist in its decision and to determine whether any relief should be paid.

**Expanded Retail Discount – the Council’s policy for granting discretionary relief.**

H.20 The Council has decided to grant relief in accordance with Central Government guidelines and in accordance with this policy.



**Appendix I**  
**Retail Hospitality and Leisure Business Rates Scheme (2022/23)**





## **General Explanation**

- I.1 The 2022/23 Retail, Hospitality and Leisure Business Rates Relief scheme will provide eligible, occupied, retail, hospitality, and leisure properties with a 50% relief, up to a cash cap limit of £110,000 per business.

### **Who is eligible for the relief?**

- I.2 Hereditaments which benefit from the relief will be those which for a chargeable day in 2022/23:
- (a) meet the eligibility criteria and
  - (b) the ratepayer for that chargeable day has not refused the relief for the eligible hereditament. The ratepayer may refuse the relief for each eligible hereditament anytime up to 30 April 2023. The ratepayer cannot withdraw their refusal for either all or part of the financial year.
- I.3 In line with the legal restrictions in section 47(8A) of the Local Government Finance Act 1988, the Council may not grant the discount to themselves certain precepting authorities (e.g., a parish or county council) or a functional body, within the meaning of the Greater London Authority Act 1999.

### **How much relief will be available?**

- I.4 Subject to the £110,000 cash cap per business, the total amount of government-funded relief available for each property for 2022/23 under this scheme is for chargeable days from 1 April 2022 to 31 March 2023, 50% of the chargeable amount.
- I.5 The relief will be applied after mandatory reliefs and other discretionary reliefs funded by section 31 grants have been applied, but before those where the Council has used their wider discretionary relief powers introduced by the Localism Act 2011, which are not funded by section 31 grants.
- I.6 Subject to the cash cap, the eligibility for the discount and the relief itself will be assessed and calculated on a daily basis. The following formula should be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the financial year 2022/23:
- I.7 The amount of relief to be granted =  $V \times 0.5$  where:
- V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and any certain other discretionary reliefs
- I.8 Ratepayers that occupy more than one property will be entitled to relief for each of their eligible properties up to the maximum £110,000 cash cap, per business.



---

## **The cash cap and subsidy control**

- I.9 Under the cash cap, no ratepayer can in any circumstances exceed the £110,000 cash cap across all of their hereditaments in England.
- I.10 Where a ratepayer has a qualifying connection with another ratepayer then those ratepayers should be considered as one ratepayer for the purposes of the cash caps. A ratepayer shall be treated as having a qualifying connection with another:
- (a) where both ratepayers are companies, and
    - (i) one is a subsidiary of the other, or
    - (ii) both are subsidiaries of the same company; or
  - (b) where only one ratepayer is a company, the other ratepayer (the “second ratepayer”) has such an interest in that company as would, if the second ratepayer were a company, result in its being the holding company of the other.
- I.11. Furthermore, the Retail Hospitality and Leisure Scheme is likely to amount to subsidy. Any relief provided by the Council under this scheme will need to comply with the UK’s domestic and international subsidy control obligations
- I.12 To the extent that the Council is seeking to provide relief that falls within the Small Amounts of Financial Assistance Allowance, Article 364 of the TCA allows an economic actor (e.g., a holding company and its subsidiaries) to receive up to 325,000 Special Drawing Rights (£343,000 as at 9 December 2021) in a three-year period (consisting of the 2022/23 year and the two previous financial years). Expanded Retail Discount granted in either 2020/21 or 2021/22 does not count towards the £343,000 allowance but BEIS business grants (throughout the 3 years) and any other subsidies claimed under the Small Amounts of Financial Assistance limit should be counted.
- I.13 In those cases where it is clear to the Council that the ratepayer is likely to breach the cash cap or the Small Amounts of Financial Assistance limit then the authority should automatically withhold the relief. Otherwise, local authorities may include the relief in bills and ask the ratepayers, on a self-assessment basis, to inform the authority if they are in breach of the cash caps or Small Amounts of Financial Assistance limit. Part 4 of this guidance contains a sample ratepayer declaration, which local authorities may wish to use to discharge this responsibility.
- I.14 The amount of relief awarded will be recalculated in the event of a change of circumstances. This could include, for example, a backdated change to the rateable value or the hereditament. This change of circumstances could arise during the year in question or during a later year.



---

## **Eligibility for the Retail, Hospitality and Leisure Relief Scheme**

I.15 Hereditaments that meet the eligibility for Retail, Hospitality and Leisure scheme will be occupied hereditaments which meet all of the following conditions for the chargeable day:

(a) they are wholly or mainly being used:

- (i) as shops, restaurants, cafes, drinking establishments, cinemas or live music venues;
- (ii) for assembly and leisure; or
- (iii) as hotels, guest & boarding premises or self-catering accommodation.

I.16 The Council considers shops, restaurants, cafes, drinking establishments, cinemas and live music venues to mean:

### **i. Hereditaments that are being used for the sale of goods to visiting members of the public:**

- Shops (such as: florists, bakers, butchers, grocers, greengrocers, jewellers, stationers, off licences, chemists, newsagents, hardware stores, supermarkets, etc)
- Charity shops
- Opticians
- Post offices
- Furnishing shops/ display rooms (such as: carpet shops, double glazing, garage doors)
- Car/ caravan show rooms
- Second-hand car lots
- Markets
- Petrol stations
- Garden centres
- Art galleries (where art is for sale/hire)

### **ii. Hereditaments that are being used for the provision of the following services to visiting members of the public:**

- Hair and beauty services (such as: hairdressers, nail bars, beauty salons, tanning shops, etc)
- Shoe repairs/ key cutting
- Travel agents
- Ticket offices e.g. for theatre
- Dry cleaners
- Launderettes
- PC/ TV/ domestic appliance repair
- Funeral directors
- Photo processing
- Tool hire
- Car hire



**iii. Hereditaments that are being used for the sale of food and/or drink to visiting members of the public:**

- Restaurants
- Takeaways
- Sandwich shops
- Coffee shops
- Pubs
- Bars

**iv. Hereditaments which are being used as cinemas**

**v. Hereditaments that are being used as live music venues:**

- Live music venues are hereditaments wholly or mainly used for the performance of live music for the purpose of entertaining an audience. Hereditaments cannot be considered a live music venue for the purpose of business rates relief where a venue is wholly or mainly used as a nightclub or a theatre, for the purposes of the Town and Country Planning (Use Classes) Order 1987 (as amended).
- Hereditaments can be a live music venue even if used for other activities, but only if those other activities (i) are merely ancillary or incidental to the performance of live music (e.g. the sale/supply of alcohol to audience members) or (ii) do not affect the fact that the primary activity for the premises is the performance of live music (e.g. because those other activities are insufficiently regular or frequent, such as a polling station or a fortnightly community event).

I.17 The Council considers assembly and leisure to mean:

**i. Hereditaments that are being used for the provision of sport, leisure and facilities to visiting members of the public (including for the viewing of such activities):**

- Sports grounds and clubs
- Museums and art galleries
- Nightclubs
- Sport and leisure facilities
- Stately homes and historic houses
- Theatres
- Tourist attractions
- Gyms
- Wellness centres, spas, massage parlours
- Casinos, gambling clubs and bingo halls

**ii. Hereditaments that are being used for the assembly of visiting members of the public:**

- Public halls
- Clubhouses, clubs and institutions



I.18 The Council considers hotels, guest & boarding premises, and self-catering accommodation to mean:

**i. Hereditaments where the non-domestic part is being used for the provision of living accommodation as a business:**

- Hotels, guest and boarding houses
- Holiday homes
- Caravan parks and sites

I.19 To qualify for the relief the hereditament should be wholly or mainly being used for the above qualifying purposes. In a similar way to other reliefs (such as charity relief), this is a test on use rather than occupation. Therefore, hereditaments which are occupied but not wholly or mainly used for the qualifying purpose will not qualify for the relief.

I.20 The list set out above is not intended to be exhaustive as it would be impossible to list the many and varied uses that exist within the qualifying purposes.

I.21 The list below sets out the types of uses that the government does not consider to be an eligible use for the purpose of this discount.

**i. Hereditaments that are being used for the provision of the following services to visiting members of the public:**

- Financial services (e.g., banks, building societies, cash points, bureaux de change, short-term loan providers, betting shops)
- Medical services (e.g., vets, dentists, doctors, osteopaths, chiropractors)
- Professional services (e.g., solicitors, accountants, insurance agents/ financial advisers, employment agencies, estate agents, letting agents)
- Post office sorting offices

**ii. Hereditaments that are not reasonably accessible to visiting members of the public**

**Retail Hospitality and Leisure Business Rates Scheme (2022/23) - the Council's policy for granting discretionary relief.**

I.22 The Council has decided to grant relief strictly in accordance with Central Government guidelines.



**Appendix J**  
**Nursery Discount Scheme (2021/22)**



## **General Explanation**

- J.1 The Government announced an extension to the business rates Nursery Discount on 3<sup>rd</sup> March 2021. This relief will apply to hereditaments occupied by providers on Ofsted's Early Years Register and wholly or mainly used for the provision of the Early Years Foundation Stage and which are subject to business rates in the year 2021/22. There will be no rateable value limit on the relief and Ofsted will ensure that all local authorities can access the Ofsted Early Years Register to help authorities identify eligible properties.

## **Who is eligible for the relief?**

- J.2 Properties that will benefit from the relief will be hereditaments occupied by providers on Ofsted's Early Years Register and wholly or mainly used for the provision of the Early Years Foundation Stage.
- J.3 To qualify for the relief the hereditament should be wholly or mainly being used for the above qualifying purpose. For the avoidance of doubt, hereditaments which have closed temporarily due to the government's advice on COVID19 should be treated as occupied for the purposes of this relief.
- J.4 In line with the legal restrictions in section 47(8A) of the Local Government Finance Act 1988, the Council may not grant the discount to itself or a precepting authority.

## **How much relief will be available?**

- J.5 Subject to the cash caps, the total amount of government-funded relief available for each property for 2021/22 under this scheme is:
- (a) For chargeable days from 1 April 2021 to 30 June 2021 100% of the chargeable amount: and
  - (b) For chargeable days from 1 July 2021 to 31 March 2022, 66% of the chargeable amount.
- I.6 The relief will be applied after mandatory reliefs and, other discretionary reliefs funded by Section 31 grants from Central Government have been applied, excluding those where the Council has used its wider discretionary relief powers introduced by the Localism Act, which are not funded by Section 31 grants
- J.7 Subject to the cash cap, the eligibility for the discount and the discount itself will be assessed by the Council and calculated on a daily basis. The following formula should be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the financial year 2021/22:
- Amount of relief to be granted =  $V \times \text{percentage Expanded Retail Discount}$ , where:
  - $V$  is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and any other discretionary reliefs



- The calculation will be undertaken ignoring any prior year adjustments in liabilities which fall to be liable on the day.

J.8 Ratepayers that occupy more than one property will be entitled to relief for each of their eligible properties subject to the cash caps explained below.

### **The calculation and the cash caps**

- J.9 No cash caps will apply for the period between 1 April 2021 to 30 June 2021.
- J.10 Under the cash caps, a ratepayer may only receive Nursery Discount up to £105,000 for 2021/22 ignoring any relief for the period before 1 July 2021:
- J.11 No ratepayer can in any circumstances can exceed the cash cap across all of their hereditaments in England.
- J.12 Where a ratepayer has a qualifying connection with another ratepayer then those ratepayers will be considered as one ratepayer for the purposes of the cash caps. A ratepayer shall be treated as having a qualifying connection with another:
- (a) where both ratepayers are companies, and
    - (i) one is a subsidiary of the other; or
    - (ii) both are subsidiaries of the same company; or
  - (b) where only one ratepayer is a company, the other ratepayer (the “second ratepayer”) has such an interest in that company as would, if the second ratepayer were a company, result in its being the holding company of the other.
- J.13 In those cases where it is clear to the Council that the ratepayer is likely to breach the cash caps then the Council will automatically withhold the discount. The Council reserves the right to request information from ratepayers to assist in its decision and to determine whether any relief should be paid.

### **Nursery Discount Scheme – the Council’s policy for granting discretionary relief.**

- J.14 The Council has decided to grant relief in accordance with Central Government guidelines and in accordance with this policy





**Appendix K**  
**Transitional Relief & Supporting Small Business Rates Relief**  
**(2022/23)**



## **General Explanation**

- K.1 The transitional relief scheme was introduced in 2017 to help those ratepayers who were faced with higher bills as a result of the revaluation. The scheme ends on 31 March 2022, as a result a small number of ratepayers would face a jump to their full rates bill from 1 April 2022.
- K.2 Government has announced that it would extend the current transitional relief (TR) scheme and the supporting small business scheme (SSB) for one year to the end of the current revaluation cycle. The scheme will restrict increases in bills to 15% for businesses with small properties (up to and including £20,000 rateable value) and 25% for medium properties (up to and including £100,000 rateable value).

## **How will the relief be provided?**

- K.3 As this is a temporary measure for 2022/23, the government is not changing the legislation around transitional relief. Instead, the government will, in line with the eligibility criteria set out in this guidance, reimburse the Council if it uses its discretionary relief powers, under section 47 of the Local Government Finance Act 1988, to grant relief.

## **Who is eligible for the relief?**

- K.4 Hereditaments that will benefit are those with a rateable value up to and including £100,000 who would have received transitional relief and/or SSB in 2022/23. In line with the existing thresholds in the transitional relief scheme, the £100,000 rateable value threshold should be based on the rateable value shown for 1 April 2017 or the substituted day in the cases of splits and mergers.
- K.5 This policy does **not** apply to those in downward transition to lower bills, those will fall to their full bill on 1 April 2022.

## **How much relief will be available?**

- K.6 Government will fund discretionary relief to ensure eligible properties receive the same level of protection they would have received had the statutory transitional relief scheme and SSB scheme extended into 2022/23.
- K.7 The practical effects of the transitional relief scheme should be assumed to remain as it is in the current statutory scheme (As prescribed in the Non-Domestic Rating (Chargeable Amounts) (England) Regulations 2016 No. 1265) except that:
- (a) the cap on increases for small properties (with a rateable value of less than or equal to £20,000/£28,000 in London) in 2022/23 will be assumed to be 15% (before the increase for the change in the multiplier). Specifically, X in



regulation 10(6) for the year commencing 1 April 2022 will be assumed to be 115. Q in regulation 10(12) should be assumed to be 1; and

(b) the cap on increases for other properties (up to and including £100,000 rateable value) in 2022/23 will be assumed to be 25% (before the increase for the change in the multiplier). Specifically, X in regulation 10(4) for year commencing 1 April 2022 will be assumed to be 125. Q will be assumed to be 1.

- K.8 The scheme applies only to hereditaments up to and including £100,000 rateable value based on the value shown for 1 April 2017 or the substituted day in the cases of splits and mergers.
- K.9 Changes in rateable value which take effect from a later date will be calculated using the normal rules in the transitional relief scheme. For the avoidance of doubt, properties whose rateable value is £100,000 or less on 1 April 2017 (or the day of merger) but increase above £100,000 from a later date will still be eligible for the relief. Where necessary the Valuation Office Agency will continue to issue certificates for the value at 31 March 2017 (regulation 17, SI 2016 No. 1265) or 1 April 2017 (regulations 16 and 18 SI 2016 No.1265). The relief will be calculated on a daily basis.
- K.10 The SSB scheme will be assumed to remain as it is in the Council's scheme (for periods up to 31<sup>st</sup> March 2022) with a percentage cap in 2022/23 of 15% plus inflation (or a cash value increase of £600 if greater).
- K.11 Where a ratepayer would have been in receipt of both transitional relief and SSB in respect of 2022/23, a single award of section 47 relief resulting in a chargeable amount equivalent to that had the original transitional relief and SSB schemes continued.

### **Subsidy control**

- K.12 The extension of transitional relief and Supporting Small Business (SSB) relief scheme is likely to amount to subsidy. Any relief provided by the Council under this scheme will need to comply with the UK's domestic and international subsidy control obligations (See the BEIS guidance for public authorities which explains the subsidies chapter of the UK-EU Trade and Cooperation Agreement (TCA), World Trade Organisation rules on subsidies, and other international subsidy control commitments).
- K.13 To the extent that the Council is seeking to provide relief that falls within the Small Amounts of Financial Assistance Allowance, Article 364 of the TCA allows an economic actor (e.g. a holding company and its subsidiaries) to receive up to 325,000 Special Drawing Rights (£343,000 as at 9 December 2021) in a three-year period (consisting of the 2022/23 financial year and the two previous financial years) Expanded Retail Discount granted in either 2020/21 or 2021/22 does not



count towards the £343,000 allowance but BEIS business grants (throughout the 3 years) and any other subsidies claimed under the Small Amounts of Financial Assistance limit, should be counted.

- K.14 In those cases where it is clear to the Council that the ratepayer is likely to breach the Small Amounts of Financial Assistance Allowance then the Council will automatically withhold the relief.

### **Recalculations of relief**

- K.15 As with the original transitional relief scheme, the amount of relief awarded will be recalculated in the event of a change of circumstances. This could include, for example, a backdated change to the rateable value or to the hereditament. This change of circumstances could arise during the year in question or during a later year.

### **Calculating the extension of transitional relief and SSB where other reliefs apply**

- K.16 Under the statutory transition scheme which ends on 31 March 2022, transitional relief is measured before all other reliefs. But the extension of transitional relief and SSB into 2022/23 will be delivered via section 47 of the Local Government Finance Act 1988 which will be measured **after** other reliefs (including other funded reliefs granted under section 47 such as RHL relief).

### **Transitional Relief & Supporting Small Business Rates Relief (2022/23) - the Council's policy for granting discretionary relief.**

- K.17 The Council has decided to grant relief strictly in accordance with Central Government guidelines.

# Equality Impact Relevance Check Form



The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. This tool will identify the equalities relevance of a proposal, and establish whether a full Equality Impact Assessment will be required.

What is the proposal?	
Name of the proposal	Business Rates Reliefs
Type of proposal (new or changed Strategy, policy, project, service or budget):	Minor change to existing policy
Brief description of the proposal:	Agreement sought to amend policy in line with legislation/ govt guidance
Name of lead officer:	Alison Hann

You should consider whether the proposal has the potential to negatively impact on citizens or staff in the following ways:

- Access to or participation in a service,
- Levels of representation in our workforce, or
- Reducing quality of life (i.e. health, education, standard of living)

A negative impact is any change that could be considered detrimental. If a negative impact is imposed on any citizens or staff with protected characteristics, the Council has a legal duty to undertake a full Equality Impact Assessment.

Could your proposal negatively impact citizens with protected characteristics? (This includes service users and the wider community)	<b>NO</b>
Could your proposal negatively impact staff with protected characteristics? (i.e. reduction in posts, changes to working hours or locations, changes in pay)	<b>NO</b>

<b>Is a full Equality Impact Assessment required?</b>	<b>NO</b>
<b>If Yes,</b> Please provide a brief description of where there may be negative impacts, and for whom. Then complete a full Equality Impact assessment Form	
<b>If No,</b> Please set out your justification for why not.	
This policy change is to enable extended relief to the businesses in the Hospitality, Retail and Leisure sectors for a further year and introduce a relief for those who do not fit the above criteria but have been adversely affected by Covid-19. There will be no negative impact on businesses owned by or serving people from Protected Characteristics. The reliefs will deliver a positive impact to those who receive them therefore no full Equality Impact Assessment is required.	
Service Director / Manager sign-off and date	Kirsty Larkins 22/1/22
Equalities Officer sign-off and date	Dave Crisfield 24 <sup>th</sup> January 2022

## Corporate Performance Report 2021-22: 3rd Quarter

Executive Portfolio Holder:	Val Keitch, Strategy and Policy
Strategic Director:	Nicola Hix, Director of Strategy and Support Services
Service Manager:	Brendan Downes, Lead Specialist People, Performance and Change
Lead Officer:	Cath Temple, Performance Specialist, Strategy and Commissioning
Contact Details:	Cath.temple@southsomerset.gov.uk or 01935 462587

## Purpose of the Report

1. This report sets out the current position of the Council's agreed key performance indicators and covers the period from October to December 2021 (Q3).

## Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date in February 2022.

## Public Interest

3. The Council is accountable to the local community for its performance. We publish performance-monitoring information to demonstrate outcomes and to highlight opportunities to learn and improve for the future.

## Recommendations

4. The District Executive is asked to note and comment on the report.

## Background

5. The Council uses a set of Key Performance Indicators (KPIs) to monitor and report on specific areas of organisational performance; this report provides an update on those measures, and a narrative summary to contextualise the quarterly statistics.

## Quarter 3 Performance

6. The attached report covers our performance for quarter 3, (October to December) 2021-22. The KPIs within the report align with the current Council Plan Annual Action plan and cover each of the five areas of focus (Protecting Core Services, Economy, Environment, Places Where We Live and Healthy, Self-reliant Communities).



7. It should be noted that for reporting purposes the method of calculation for both performance against target and direction of travel are as follows:

GREEN –	0-5% within target
AMBER –	6-10% below target
RED –	11%+ below target

8. The summary position for each area of focus is described below. The report detail illustrates that while the many of the measures reported in the quarter present as being on or above target with a positive direction of travel, some areas are not achieving targets, and improvement plans are in place to improve the situation. The supporting narrative (both within the performance report and this cover report) is provided by the relevant KPI owner/Lead Officer and explains background and improvement plans.
9. Overall of 50 KPI's reported, 13 KPIs are significantly (>11% ) below target, 7 are underperforming (amber), while 23 are either on or ahead of target or within agreed tolerance. 5 Measures were not due this quarter (reported annually or bi-annually) and a further 2 measures do not yet have targets assigned.
10. On direction of travel, 14 were trending negatively, and 23 with marginal or positive improvement on previous quarter. 13 measures did not report this quarter. Of these, 5 were not due to report this quarter (annual and bi-annual measures) and for the remaining 8 a comparison with Q2 was not possible as that data was not available. Additional Trend indicators (arrows) are provided in the report for qualitative measures where appropriate

## **11. Protecting Core Services:**

### **11.1 Connect, Revenues and Benefits (PCS1-9):**

My Account on-boarding, related to the promotion and customer shift to use our online services, was severely impacted in Q3. Due to technical issues with the website customers have had challenges with creating their accounts. We have therefore opted to postpone the launch of a promotional campaign for E-billing on My Account as the current priority is to ensure we have a stable My Account service before we actively promote additional services.

A Microsoft update also caused issues with the server that supports the Northgate system, which seriously impacted the Revenues and Benefits services for a number of days in December. This meant the teams were unable to function during this period which led to backlogs in processing. System recovery planning also required careful management but full services were in place and recovered within 4 days. Business continuity plans have subsequently been updated to improve resilience going forward.

Due to these technical challenges we have seen an increase in calls received by the customer connect team, which has subsequently impacted on statistics around calls completed at first point of contact.

### **11.2 Planning: (PCS 10-15).**



## South Somerset District Council

Following advice from Natural England that the levels of phosphates within the protected Somerset Levels & Moors is likely to adversely impact upon the environmental interests, we are unable to progress planning applications that may generate additional phosphates (e.g. dwellings / livestock accommodation) without having suitable mitigation in place. This issue has had an ongoing impact on the planning teams throughput and ability to determine applications.

The planning KPI's we report on are set as a Government measure, and against these measures we would be deemed to be performing. However, on the performance report we have elected to show status as an issue (red) due to the fact there are around 350 major/minor applications (approx. 4000 dwellings) being held up due to the phosphate issue, which is an area of ongoing concern for the organisation.

### 12. **Economy**

#### 12.1 **Procurement: (E1-E3)**

Good progress continues to be made in the implementation of Social Value at SSDC. The use of the Social Value Portal to record and validate Social Value delivery claimed by suppliers is gaining traction with in-scope suppliers, despite some initial reporting challenges. Now this has been resolved we anticipate an uplift in delivered social value in Quarter 4. We expect our Leisure Operator Freedom Leisure will report progress in Q4 on the leisure contract SV figures. It should also be noted that some SV measures are only input annually by suppliers and not on a quarterly basis.

#### 12.2 **Regeneration: (E4-E6)**

Progress continues on the 3 key regeneration projects at Yeovil, Wincanton and Chard despite ongoing challenges around Covid and related supply chain issues. A major highlight of Quarter 3 was the opening of the new Chard Leisure Centre on Monday 8th November. The centre boasts a five-lane adult swimming pool, a beginner's pool, cafe, children's soft play area and gym with additional studios.

#### 12.3 **Economic Development (E7-E11)**

As a Council we continue to respond and support businesses and individuals through the pandemic. In Q3 all three Employment Hubs opened in Chard, Yeovil and Wincanton - these are branded as South Somerset Opportunities Hubs. We are yet to see the desired uptake of the hubs by individuals and the challenge for Q4 is to ensure greater use and awareness for individuals within South Somerset. That said, the hubs have been able to provide meaningful support to over 25 individuals and the appointed Hub co-ordinator is working well with businesses to increase engagement.

We continue to support businesses through administering grant schemes. We had expected the Revitalisation Grant to receive more applications however still awarded in excess of £200,000. The increase of Covid cases has affected plans for the discretionary spend. The Growth Grant was unfortunately paused and is unlikely to reopen, this is due to the requirement to support businesses most impacted. The team have worked quickly





## South Somerset District Council

to launch Government's Omicron Hospitality and Leisure Scheme and are in the process of assessing and making payments to businesses. Pending final assessment we will shortly be in a position to award over £900,000 to local businesses.

Responding to the changing Covid 19 pandemic has had an impact on the ability to progress certain projects. Inward Investment and Improved Rural Transport are the two areas currently marked as amber within the Council's RAG rating. Progress has been made over the past two quarters on these projects, and we are working closely with the County Council and other Districts to develop further.

We have continued to raise awareness of broadband activity and solutions within the area. A successful online event was held with over 40 individuals attending with speakers from local broadband providers and digital skills providers outlining how residents can benefit from local programmes. South Somerset residents are continuing to take advantage of the Gigabit Voucher Scheme with over 100 vouchers being issued during Q3.

Over the past 2 years the Council has worked hard to develop a partnership approach to delivering a successful innovation and skills ecosystem. The Place Leadership Group has now adopted an eight-point action plan to accelerate enterprise, innovation and skills within South Somerset. Delivery has commenced against many of these points, and we are in a strong position to leverage support as we move into Q4.

### 12.4 Tourism (E12)

In spite of the challenges presented by Covid, the team have shown great resilience, flexibility, and visitor numbers have increased. The Visit South Somerset website has received over 62,000 views during Q3 with visitors spending considerable time on the site.

Although the tourist information centre at Petters Way remains closed, the number of visitors at Cartgate increased to 3393 this quarter, an average of 37.7 per day.

## 13. Environment:

### 13.1 Environmental Programmes (EN1-3)

Action on the climate and ecological emergency continues to be a focus for the authority, and good progress is being made across land use, energy use and community engagement.

In 2020-2021 SSSDC made an overall carbon reduction on the baseline year emissions (2018-2019) of 17%, 7% reduction on the previous year's emission, missing the 10% target reduction by 3%. This was mainly due to increase in vehicle use during the lockdown as teams couldn't share vehicles and some additional use to support delivering care packages to the community. Gas usage in the crematorium was also up on previous years.



## South Somerset District Council

The calculations for 2021-2022 are yet to be started but the forecast is that, due to SSDC transferring all its electricity supply to a renewable energy tariff, a significant carbon reduction will be achieved. Further work is ongoing to identify opportunities to reduce carbon emissions across our estate and assets, and separately opportunities to transition to electric vehicles and machinery when the existing vehicles need replacing are being addressed

In addition to initiatives to deliver the annual 10% target for Carbon Reduction on the SSDC estate, a project is ongoing to address the carbon footprint of our leisure operations through utilisation of the Public Sector Decarbonisation Scheme. The Public Sector Decarbonisation Scheme (PSDS) is a government funded initiative from BEIS (Department for Business, Energy and Industrial Strategy) which funds decarbonisation improvements for public sector buildings and assets.

Under this initiative we are working with our appointed leisure operator (Freedom Leisure) to utilise Phase 1 of our PSDS funding. The delivery of the PSDS grant is within the Council's built leisure estate (Goldenstones, Wincanton Sports Centre and Westlands Sport and Fitness Centre). Phase 1 was due to be completed by the end of March but we are awaiting approval for an extension for the end of June. If the programme is fully realised then we expect to reduce carbon emission by 435 tonnes per annum, which is in addition to our own 10% reduction target.

### 13.2 **Waste Contract: (EN4-6)**

The Somerset Waste Partnership (SWP) manages waste and recycling services on behalf of all local authorities in Somerset. The partnership is governed through a Joint Committee known as the Somerset Waste Board

As part of the partnership delivery plan, a Recycle More scheme was rolled out to South Somerset at the end of June 2021. This promotes recycling of plastics in addition to existing recycling initiatives. The impacts of this are now being recorded in our statistics (we report SWP data a quarter in arrears). While statistically performance is improving, the launch and initial embedding of Recycle More in South Somerset was significantly hampered by the nationwide driver shortage, a situation that has been exacerbated by pandemic delays to driver training, Somerset's challenging labour market and the strain on crews who have been coping with increased tonnages for a sustained period.

In the autumn operational changes to the Suez operations were implemented at the Lufton depot (recycling and garden waste collections now running from the site as well as refuse). These changes also affected collection reliability in some localised areas last month. Additional staff and management support was subsequently put in place to address these issues, with the early signs of improvement are encouraging

## 14. Places Where We Live

### 14.1 **Housing: (PWVL1-7)**



## South Somerset District Council

Our homelessness prevention approach is proving effective at coping with increasingly complex and urgent demand. This is in large part due to pre-emptive additional investment in community partners (Gateway, Citizens Advice) as well as increasing our own case capacity

Rough sleeper numbers have dropped substantially as new measures have been put in place. Examples include the new outreach approach including the drop-in centre and outreach workers in-situ working more proactively with rough sleepers. There have also been improvements in the management of our emergency accommodation.

With regards to homelessness prevention (people in B&B), we can report low numbers despite the challenging context of the current housing market (reduced supply and increasing rents) and delays in completion of affordable housing.

We also have a broader range of groups presenting with a more complex profile of vulnerabilities and needs, many of which cannot be accommodated in our current provision. We are seeking to replace our current emergency accommodation and improve our temporary accommodation provision.

### 15. Healthy, Self-Reliant Communities

#### 15.1 **Community Engagement activities and support (HSRC1&2)**

**Careline:** Careline customer numbers remain static with a small, expected reduction in Q3. There has been a focus on the programme of battery replacements for careline units. The team has been able to return to installation although self-install options are still encouraged. Batteries for the older units last about five years and the rolling programme of replacement, stopped due to Covid has resumed. The team has successfully trialled the use of “Smart Hubs” which enable access via the mobile phone network via a SIM rather than through a landline. Several hubs have been installed and monitored closely to ensure that the technology works for customers in a range of different accommodation types and areas. We will now promote the new units as part of a campaign planned in Q4.

**Health Walks:** Many of the established walks have resumed with volunteer leaders happy to lead walks with support around risk assessments etc. A training course for new leaders has increased the number of active leaders to 80. Numbers of participants are rising steadily, and we would expect that to continue as people become more confident in returning to previous activities and as the weather improves.

**Play Days/Schools Out programme:** The team has been preparing for the ‘Schools Out’ holiday activity programme which will run in venues across Yeovil during the February half term. The Play Day programme is also being finalised with plans to run 12 across the District during the Summer holidays.

**Community Grants:** In general, community activity has increased with activity/projects that had stalled due to Covid resuming. Some groups have been able to access funding made available to support recovery from Covid. After a slow start to the year, applications to our Community Grants scheme are picking up. However, delivery of some capital projects has been affected by difficulties with supply and delivery of materials.

## 15.2 Freedom (Leisure Operator) Community Outreach (HSRC3)

Overall, the supplier relationship with Freedom Leisure has proved to date to be collaborative and positive. Performance measures on the Freedom contract are still to be finalised as part of the year one onboarding of the operator, and Freedom's own internal audit team have identified where improvements are required within the South Somerset Contract. However Freedom have a good track record elsewhere and therefore it is expected that this will improve as the contract matures.

Initial data suggests that following a positive launch of the Chard Leisure centre usage rates are encouraging. In addition the appointment of an active communities coordinator has been secured, and progress is being made in terms of community outreach. An additional grant of £10K has also been secured to support people impacted by the pandemic in returning to exercise.

### Financial Implications

16. There are no financial implications to this report.

### Legal implications (if any) and details of Statutory Powers

17. There are no legal implications to this report.

### Risk Matrix

18. This report is for information only – there is no risk profile

### Council Plan Implications

19. [Council Plan 2020-2024](#)

### Carbon Emissions and Climate Change Implications

20. Our Environment area of focus covers the Carbon emissions and climate change implications. There are no implications regarding the producing of this report.

### Equality and Diversity Implications

21. There are no equality and diversity implications within this report.

### Privacy Impact Assessment

22. There are no named individuals included within this report.

### Background Papers

- [Council Plan 2020-2024](#)
- Council Plan Annual Action Plan 2020/21



# South Somerset District Council

## Corporate Performance Monitoring

Quarter 3 report: October to December 2021



Page 237



**Protecting  
Core Services**



**Economy**



**Environment**



**Places where we live**



**Healthy, Self-reliant  
Communities**



Protecting  
Core Services



Economy



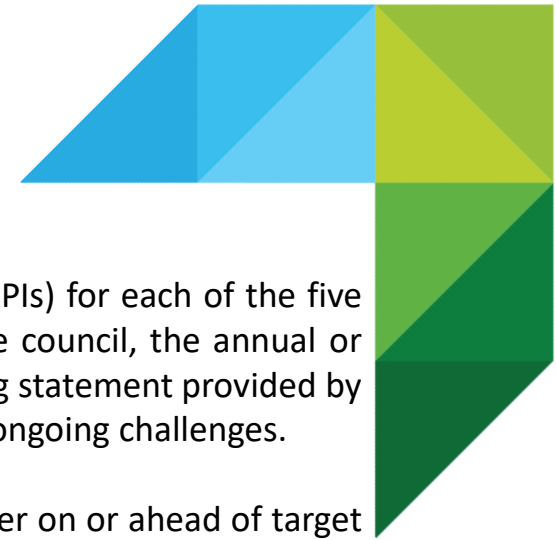
Environment



Places where we live



Healthy, Self-reliant  
Communities



This is our third quarterly report for the 2021-22 Council Plan annual action plan and covers Key Performance Indicators (KPIs) for each of the five areas of focus. The report provides a summary description of the key areas of performance being monitored within the council, the annual or quarterly target, quarterly RAG\* status and comparison to previous reporting period where relevant. In addition a supporting statement provided by the relevant KPI owner/Lead Officer provides additional context around current performance and planned improvements or ongoing challenges.

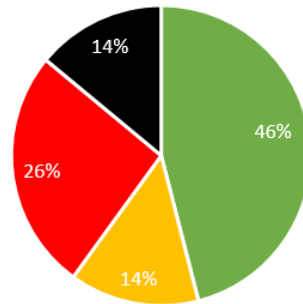
Overall of 50 KPI's reported, 13 KPIs are significantly (>11% ) below target, 7 are underperforming (amber), while 23 are either on or ahead of target or within agreed tolerance. 5 Measures were not due this quarter (reported annually or bi-annually) and a further 2 measures do not yet have targets assigned.

On direction of travel, 14 were trending negatively, and 23 with marginal or positive improvement on previous quarter. 13 measures did not report this quarter. Of these, 5 were not due to report this quarter (annual and bi-annual measures) and for the remaining 8 a comparison with Q2 was not possible as that data was not available. Additional Trend indicators (arrows) are provided for qualitative measures where appropriate.

Page 138

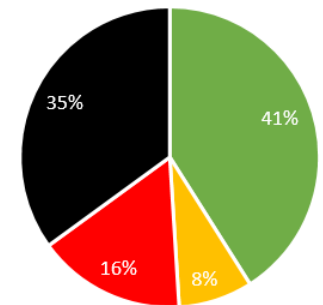
### Progress against targets - summary for this quarter

- Red = 11%+ below target
- Amber = 6-10% below target
- Green = on, or +/- 5% ahead or behind target
- Measure not reported this quarter



### Progress against targets – comparison with Q2

- Red =11%+ below target
- Amber = 6-10% below target
- Green = on, or +/- ahead of or behind target
- Measure not reported this quarter











\*RAG status is a management tool whereby a traffic light system using red, amber (yellow), and green is used to signify status against targets. Please note where KPI's are qualitative in nature, a RAG status has still been provided by the lead officer to support the readers understanding around overall progress

# Protecting Core Services

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PCS1	Online accounts (Quarterly)	The number of new Customer accounts during the quarter	25,000	6,250	4,631	2,980	●	● ↘	System issues with 'my account' set ups have had an impact on performance this quarter. Planned ongoing improvements include the implementation of electronic billing and a supporting 'my account' promotional campaign.
PCS2	Online service requests (Quarterly)	Percentage of service requests completed online	87%	87%	85.25%	87.5%	●	● →	There are good levels of online usage by our customers. Most payments are now available online. This figure doesn't include 'my account' or waste transactions.
PCS3	Calls completed at first point of contact (Quarterly)	Percentage of calls completed as a one and done	80%	80%	72%	64%	●	● ↘	Due to system issues there was a severe impact on the ability of the teams to process transactions online, leading to an increase in the number of calls to our Connect team. The Digital team is working with system providers to implement improved system resilience.
PCS4	Council Tax Collection (Quarterly)	Cumulative percentage of Council Tax collected	98%	24.50% (Cumulative target 73.5%)	54.12%	80.6%	●	● →	Council Tax debt recovery continues with 100 reminders sent per day. Court action is planned for Q4. Recruitment is underway for additional resource to reduce backlogs.
PCS5	National Non Domestic Rates (NNDR) collection (Quarterly)	Cumulative percentage of NNDR collected	97%	24.25% (Cumulative target 72.75%)	49.45%	73.15%	●	● →	A small amount of phone contact is being made with NNDR debtors and agreements made for payment. Recruitment is underway. Reminders are due to be issued in Q4.

# Protecting Core Services






Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PCS6	Housing Benefit – New (Quarterly)	The number of days taken to process new housing benefit claims	21 days	21 days	79 days	75 days			An improvement plan is in place following work with Department of Work and Pensions, including changes that will improve performance in Q4. The system issues that impacted performance during this quarter have been resolved. .
PCS7	Housing benefit change of circumstance (Quarterly)	The number of days taken to process a change of circumstance request	7 days	7 days	12 days	12 days			The above update is also relevant to this measure.
PCS8	Council Tax – New (Quarterly)	The number of days taken to process a new Council Tax application	30 days	30 days	55 days	56 days			System outages have impacted on the team this quarter with 4 complete days with no access. The team are preparing for annual billing during quarter 4 so performance is not expected to improve until Q1 2022/23.
PCS9	Council tax change of circumstance (Quarterly)	The number of days taken to process a change of circumstance request	7 days	7 days	4 days	5 days			Processing is still within target.



# Protecting Core Services

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PCS10	Planning applications – major (Quarterly)	The % of major planning applications determined with 13 weeks or with an extension of time. The aim of this measure is to stay above the target, which is the National Government Measure.	60%	60%	71%	100%	●	●	<p>The 100% figure is the result of two major decisions being determined within the 13 weeks or with extensions of time. The red status reflects the large number of applications held up in the planning system due to phosphates.</p> <p>The loss of our in-house ecologist has impacted caseload and means we are more reliant on Somerset Ecology. There is no current timescales for completion of the phosphate work. The planning team continue to monitor the situation.</p>
PCS11	Planning applications – minor (Quarterly)	The % of Minor planning applications determined within 8 weeks or with an extension of time. The aim of this measure is to stay above the target, which is the National Government Measure.	70%	70%	74%	85%	●	●	<p>In Q3 105 minor planning applications were determined of which 90 applications were within 8 weeks or with an extension of time. However for the same reason as above the status is red. 65% of the minor caseload remains held up by phosphates.</p>

# Protecting Core Services

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PCS12	Planning applications – other (Quarterly)	The % of Other planning applications determined within 8 weeks or with an extension of time	80%	80%	87%	87%			In Q3 190 other applications were determined of which 167 were within time or extension of time. The reason for the amber status is that the number of decisions made this quarter decreased due to a lack of conservation resource and Christmas period. We hope to see determinations increase in Q4.
PCS13	Planning appeals lost	The number of major appeals lost expressed as a % of all major decisions	10%	10%	5.21%	0%			There were no major appeals determined during Q3. There are currently 2 live major appeals both in Castle Cary
Page 242 PCS14	The % of overall requests that are granted extensions of time (Quarterly)	The % of overall requests that are granted extensions of time (EoT). For this measure the aim is to be on or under the target.	50%	50%	42%	59%			This quarter we have seen the need for an extension of time increase. A high number of development types need to defer determination of applications pending comments particularly from the County Council's Highways and Ecology teams where officers believe the contribution of these consultees to the scheme is important. During Q3 we have also seen delays in conservation comments due to staff shortages which has contributed to this increase.  Officers do not have the scope to refuse applications for lack of information where they delay may lie with colleagues feeding into the planning appraisal.
PCS15	Planning validations (Quarterly)	The number of days between receipt of application and start of validation – the aim of this measure is to be on or under target.	10 working days	10 working days	5 working days	12 working days			The reduction in staff numbers has impacted timescales this quarter with cases taking an average of 12 days. Recruitment is underway. A revised validation checklist will be issued at the end of Q4 to reduce the number of invalid applications.

# Protecting Core Services

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PCS16	Commercial property income yield (Annual)	The amount of income received from commercial property (annual)	£449K	<b>Annual Measure</b>	-	-	-	n.a.	This measure reports annually at Q1 – the capital and revenue budget monitoring reports are due at District Executive in February. An update will be provided in this report in Q4.
PCS17	Average increase of business services	The amount of income received from business services (annual)	5% or £250k	<b>Annual Measure</b>	-	-	-	n.a.	This measure reports annually at Q1 – as above the capital and revenue budget monitoring reports are due at District Executive in February. An update will be provided in this report in Q4.
Page 243 PCS18	Employer of choice – Sickness, retention & wellbeing	A. Staff retention	A. 14%	A. 14%	A. 3.88%	A. 3.8%	●	● →	Staff retention and sickness are holding up well against target. The staff wellbeing survey is due to take place in Q4 therefore will report next quarter.
		B. Sickness	B. 7.5 days	1. 7.5 days	B. 2.47	B. 2.99	●	● ↘	
		C. Wellbeing (completion rate and satisfaction score)	C. 100%, 51%	1. 100%, 51%	C. N/A	C. N/A			

# Protecting Core Services

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PCS19	Employer of choice – Engagement	Annual Employee Engagement survey results	1. Participation rate 45% 2. Overall satisfaction rate 70%	N/A	1. 45% 2. 70%	-	-	n.a.	This measure reports annually at Q2. Following on from analysis of the results of the Annual employee engagement survey, there have been 4 workshops with staff across the business to investigate opportunities for improvement. A working group has been set up and they have produced an options paper which is shortly due to go to Senior Leadership Team. One action already underway is cross-team working to improve digital literacy.
Page 244 PCS20	Resident feedback	The number and types of interactions with Residents (Facebook, Twitter and direct messages) Communications with SSDC Town & Parish updates Committee Meeting Viewings New opportunities	1. No. of interactions 2. Communications with SSDC 3. Town & Parish updates 4. Committee meeting viewings 5. New opportunities	N/A	-	1. 15,4095 2. 1,579 3. 4 4. 5,106 5. 1	●	n.a.	The breakdown of interactions (1) is Facebook 99,695, Twitter 54,400. There were 1,579 direct communications with SSDC, received from 737 different customers. There were 4 Town & Parish Updates produced in Q3 with a 56% open rate. Committee meetings were viewed 5,106 times with a total viewing time of 545.9 hours. A new website for opportunities went live during the quarter ( <a href="http://www.opportunitieshubsouthsomerset.com/">www.opportunitieshubsouthsomerset.com/</a> ) bringing the total number of SSDC supported websites to 10. The most popular pages on southsomerset.gov.uk were: Search for a planning application, when are my bins collected and make a payment with a combined total of 136,348 views.

\*\* no direction of travel due to no data in Q2 for comparison



# Economy

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
E1	% spend with local Small and Medium-sized Enterprises (SMEs) (Quarterly)	% of influenceable procurement spend with local SMEs	10%	10%	4.67%	8.04%			In Q3, procurement spend for SSDC was £7.4m, taking total year to date spend to £21.7m. SME and Local spend in SSDC local postcodes was £1.7m. SME and Local spend within a 30 mile radius of Yeovil was £8.7m which equates to 40% of total spend, and included 19 of the top 20 suppliers by spend. . Of 973 active suppliers used this year, 311 have been located in SSDC postcodes.
E2	Social Value Forecast (Quarterly)	£ Total forecast committed social value from SSDC supplier contracts	Contract dependent	Contract dependent	£7.5 million cumulative	£12.9 million cumulative			By Q3, a cumulative £12. 9M Social Value has been committed by suppliers (via the Social Value Portal) to be delivered in South Somerset. In addition, £73,094 of social value has been committed from tenders where social value was assessed in-house.
E3	Social Value Realised (Quarterly)	£ Total Actual realised social value from SSDC supplier contracts	100% of forecast	100% of forecast	£23K cumulative	£23,736 cumulative			To date actual Social value has been delivered through the new leisure contract. The interventions included creation of apprenticeships, career support and education sessions delivered and reductions in carbon (car mileage)  Looking forward there is potential to increase Social Value realised on smaller contacts, although the local methodology for assessment needs further development in the coming year.

# Economy

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
E4	Regeneration – Chard (Quarterly)	Regeneration programme for Chard	*Various dependant on programme	<ol style="list-style-type: none"> <li>Priority highway improvement works for leisure centre access complete.</li> <li>Leisure Centre complete.</li> </ol>	-	<ol style="list-style-type: none"> <li>100%</li> <li>100%</li> </ol>		n.a.	These targets were due in Q4 but have been completed ahead of schedule. The priority highway improvement works are complete. The Leisure Centre is complete and opened to the public on 8th November.
E5	Regeneration – Wincanton (Quarterly)	Regeneration programme for Wincanton	*Various targets dependant on programme	<ol style="list-style-type: none"> <li>No Milestone required in this quarter</li> </ol>	-			n.a.	The public realm procurement process has been completed and a preferred contractor identified. Construction is likely to start at the end of Q4.
E6	Regeneration – Yeovil (Quarterly)	Regeneration programme for Yeovil.	*dependant on programme plan	<ol style="list-style-type: none"> <li>Finalise Workspace Strategy</li> <li>Finalise Car Parking Action Plan</li> <li>Sign off phase two of Cycling and Walking Package</li> </ol>	-	<ol style="list-style-type: none"> <li>N/A</li> <li>90%</li> <li>90%</li> </ol>		n.a.	<p>The workspace project has been removed from the current work programme pending a full commercial business case being presented to council.</p> <p>Work on the action plan has taken place but it has not been finalised as the public realm work has been accelerated in the programme and this has taken priority.</p> <p>The phase 2 designs are now complete and have been released for public consultation.</p>

Quarter status reported is the degree of completion of milestones which are planned to be achieved in the reporting period.  
 All Regeneration programme data is manually produced based on progress against the planned programme.

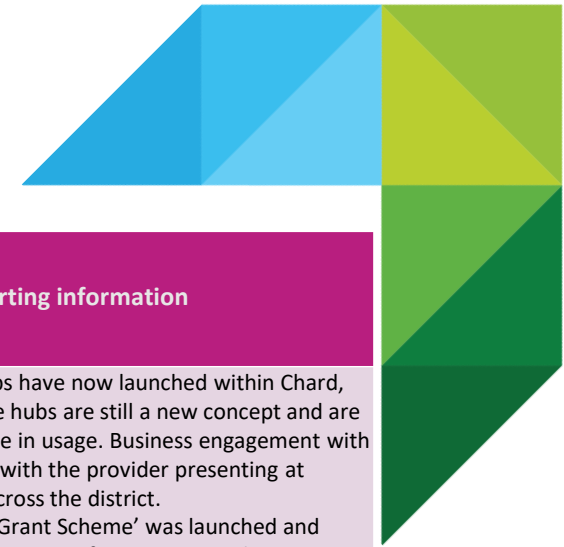


# Economy

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
E7	Inward Investment (Quarterly)	To create high value job creation, through the re-location of businesses into South Somerset. To support local supply chains, whilst building on key sectors that support the local economy.	Qualitative measure	-	-	See supporting information	●	●	Inward Investment approach agreed with Somerset County Council and Somerset District Councils. The approach will combine Inward Investment and Innovation. Business Rate Retention Pilot funding has been confirmed with delivery due to commence in Q4. Next Steps: Appoint consultant to deliver key aspects of Inward Investment including brand development, website and sector reviews.
E8	Improved Broadband (Quarterly)	Measures reporting on the support given by SSDC to facilitate improved digital connections across the district	Qualitative measure	-	-	See supporting information	●	●	A 'South Somerset Get Digital' event was organised and hosted by SSDC in December. Over 40 individuals attended, the event was open to members of the public and Councillors. Presentations from Connecting Devon and Somerset, Wessex Internet, Jurassic Fibre, Konnect Wifi, Spark Somerset, Yeovil College and the Heart of the South West Digital Skills Partnership. The SSDC Broadband Directory has been updated and distributed across South Somerset, the directory includes information on available providers who are actively building networks within the district . Advice provided to businesses and residents through online meetings, emails and SSDC's website. Connecting Devon and Somerset programmes promoted through Economic Development E-Newsletter and SSDC's Social Media channels. Programmes include: Phase 2 of superfast programme, Mobile Boost Scheme (boosting mobile coverage), Relevant voucher schemes (including the national Gigabit Voucher Scheme) - 130 UK Gigabit Vouchers Issued Next Steps: Continue to promote connectivity programmes to businesses and individuals. Hold quarterly update briefing for councillors. Continue updates and promotion of Broadband Directory



# Economy



Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
E9	Support for Individuals & Businesses through the pandemic	<ol style="list-style-type: none"> <li>1. Support unemployed individuals into work, education or training</li> <li>2. Provide support to businesses in the form of grant funding and support services</li> <li>3. Support Town Centre businesses through Welcome Back Fund and Market Towns Investment Group</li> </ol>	Qualitative measure	-	-	See supporting information	●	●	<p>All three Employment Hubs have now launched within Chard, Yeovil and Wincanton. The hubs are still a new concept and are starting to see an increase in usage. Business engagement with the hubs has commenced with the provider presenting at several business forums across the district.</p> <p>A 'Business Revitalisation Grant Scheme' was launched and provided a total of over £200,000 of support to 36 businesses. Omicron Hospitality and Leisure Grant scheme launched and currently open to applications</p> <p>Promoted SSDC online information to support businesses and individuals through redundancies.</p> <p>Town Councils continue to deliver the Welcome Back Fund Market Town Investment Group funding applications continue to be reviewed and allocations made / claimed.</p> <p>Next steps: To market / promote Employment Hubs and work with partners to increase use. Process and award Omicron Hospitality and Leisure Grants. Launch Additional Restrictions Grant Scheme for businesses impacted by Covid 19 and not eligible for Omicron Hospitality and Leisure Grant. Continue to work with Town Councils on Market Town Investment Group funding and Welcome Back Fund to increase spend within Market Towns</p>
E10	Innovation and Skills Ecosystem (Quarterly)	Develop South Somerset's innovation and skills ecosystem - To collaborate with key stakeholders to build upon existing innovation infrastructure and develop South Somerset's innovation and skills ecosystem. Leading to an increased number of high value employment opportunities, generation of business growth and productivity, and increasing the number of successful start-ups within the area.	Qualitative measure	-	-	See supporting information	●	●	<p>Good progress made this quarter with the following achieved: Enterprise Innovation and Skills action plan reviewed and updated, action points developed and activity commenced in partnership with key business and local stakeholder through the Place Leadership Group. Scope extension agreed to deliver additional expertise in innovation and growth. Working groups to be developed and agreed including external key stakeholders. County wide approach to innovation agreed with key actions developing, further information coming in Q4.</p> <p>Next Steps: Review activity, progress internal programmes to align with Action Plan. Seek additional 'buy-in' from stakeholders to progress. Commence long term thinking in line with external factors (LGR, Recovery, Government priorities)</p>



# Economy

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
EA Page 249	Improved Rural Transport (Quarterly)	To improve transport services through technology and innovative solutions across South Somerset. Including a particular focus on increasing opportunities for those seeking employment, education or training.	Qualitative Measure	-	-	-	●	●	<p>Digital Demand Responsive Transport (DDRT) study received and reviewed. The study included:</p> <ul style="list-style-type: none"> <li>• A transit scan of South Somerset that identified gaps within the public transport network</li> <li>• A simulation study of where a DDRT solution would work best and have the most positive affect</li> </ul> <p>SSDC have worked with Somerset County Council on the National Bus Strategy, and the creation of a Bus Service Improvement Plan (BSIP) to ensure the inclusion of a DDRT solution being included within this plan. The BSIP has been submitted to Government and SCC are waiting to hear the result of any funding allocations from the Government's £3bn National Bus Strategy fund. SSDC continue on groups and statutory Boards associated with the National Bus Strategy / Bus Improvement Plan. Next steps: Continue to work with Somerset County Council to progress Bus Service Improvement Plans. SSDC to host expert group meeting to discuss DDRT commission</p>

# Economy

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
Page 250	Tourism in South Somerset (Quarterly)	<p>To ensure South Somerset continues to be a prime location for visitors. The targets for this measure include:</p> <ul style="list-style-type: none"> <li>Promote South Somerset as a place to visit and stay to those outside of the area</li> <li>Promote events and activities to people living within South Somerset</li> <li>Support projects that increase the value of the visitor economy within South Somerset</li> <li>Work in collaboration with businesses on projects that benefit the local area</li> <li>Contribute to strategic projects that enhance the visitor economy within South Somerset</li> <li>Encourage sustainable tourism initiatives</li> <li>Support 'green tourism'</li> </ul>	Qualitative measure	-	-	-	●	●	<p>River Parrett Trail – Promotional filming complete, work continuing on promotional flier, route descriptions and website for a spring 2022 launch. Launch event to be planned for Spring.</p> <p>Visit South Somerset website continues to be populated with accommodation businesses, attractions and events. Initial stats are very positive – August – December 2021 showed 14,321 users, 62,615 page views and a 45.04% bounce rate, which indicates that people are spending a decent time on a page and finding the information they need.</p> <p>The South Somerset Visitor Information Centre at Cartgate traded to 5 days a week with a special Christmas open evening for staff. 3393 visitors in this quarter. Seasonal plants from the SSDC nursery were stocked to help promote the nursey. The Yeovil Tourist Information Centre remains closed because of the Covid precautions.</p> <p>Four Tourism newsletters emailed, including details about the SSDC business support grants. Database currently stands at 361 businesses up from 348 at the start of Q3 Open rate 46.5%.</p> <p>Our new promotional leaflets (Things to do, Accessibility guide, Dog friendly Days out and Explore South Somerset map) are available on <a href="http://www.visitsouthsomerset.com">www.visitsouthsomerset.com</a>.</p> <p>The team have visited out of the 8 out of 10 of the South Somerset Local Information Centres to offer help, support, and confirm eligibility for the annual SLA grants.</p> <p>Q4 activity - Welcome Host training for the information centre staff and volunteers.</p>









\*\* no direction of travel due to no data in Q2 for comparison



# Economy

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
E Page 251	Freedom Leisure (Quarterly)	<p>A suite of measures related to the Economic and Social improvements that form part of the Freedom Leisure contract –</p> <ul style="list-style-type: none"> <li>• Financial Performance</li> <li>• Service Quality</li> <li>• Environmental</li> <li>• Contract Social Value</li> </ul>	These measures are to be agreed between SSDC and FL	-	-	-	●	n.a.	<p>An agreed suite of metrics for the contract have not yet been finalised, as the focus for Freedom and SSDC was delivery of the Chard Leisure Centre which opened in November 2022. Proposed metrics which are being developed will be finalised soon to enable 2022/23 monitoring.</p> <p><b>Financial performance</b> - within budget but behind quarterly target. Increases in energy costs and National Insurance contributions coupled with plant breakdowns have contributed to higher than expected costs. The early opening of Chard Leisure Centre is promising and is expected to improve the overall financial position at year end.</p> <p><b>Service Quality</b> – The centres have not yet been through a Quest (external quality benchmark) assessment. An internal quality audit showed that there some areas for improvement particularly in relation to customer complaints. The teams are working to address these points.</p> <p><b>Environmental</b> - Gas and electricity consumption is a little over target across Goldenstones, Wincanton and Westlands, although capital works (planned for completion by September 2022) will improve customer facilities and reduce energy consumption and reduce carbon emissions by circa 435 tonnes PA</p> <p><b>Contract Social Value</b> – this is reported within Social Value PI's (E2 &amp; E3)</p>

\*\* no direction of travel due to no data in Q2 for comparison

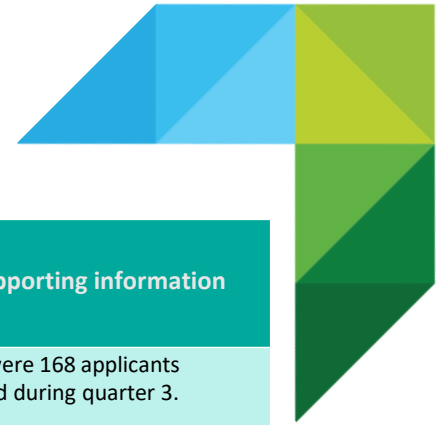
Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
EN1	SSDC land managed for Ecology, Conservation & Environment (Bi-annually)	Square metres of SSDC land managed in terms of ecology, conservation and environmentally supportive	% increase	<b>Bi-Annual Measure</b>	0.51759%	-	-	n.a.	This measure is bi-annual and isn't due to report until Q4. However, progress is being made to increase the % of land managed for ecology, conservation and to support the environment with many more areas signing up for "No mow" next year.
EN2	Environmental Outreach (Quarterly)	Number of environmental forums held, to also cover environmental interactions	4	1	1	0			Although no environmental forums were held during Q3 r there are a number planned for Q4 and Q1 22/23. 6 newsletters were issued during the quarter with increased readership. Support offered by the team has also increased this quarter with surveys issued, grants paid out and outreach support given.
EN3	Carbon reduction (Annually)	The % reduction in the footprint across the SSDC estate	10%	<b>Annual Measure</b>	-	-	-	n.a.	This measure reports annually at Q1 however progress has been made by switching energy supplier. Investigations are underway into additional areas for carbon reduction across the SSDC estate.
EN4	% of household waste recycled (Quarterly)*	The % of all household waste recycled (Somerset wide)	54%	**	56.48%	57.34%			Figures from Somerset Waste Partnership are for Q2 and cover the whole county. The Recycle More campaign went live in July 2021 which explains the increase in the recycling figure and related reduction in landfill figure.
EN5	Residual waste sent to landfill (Quarterly)*	The % of residual waste volume going to landfill (Somerset wide)	46%	**	8.26%	5.91%			As described above, the waste to landfill figure is substantially lower this quarter due to the increase in recycling across 2 of the 4 districts.
EN6	Waste recycled in the UK (Quarterly)*	The % of all waste collected which is recycled in the UK (Somerset wide)	90%	**	97.27%	98.62%			The amount of material recycled in the UK increased due to the sale of parts of Viridor, who operated the recycling sites, to Biffa. This has changed some of the reprocessors used for recyclables from the sites, predominantly the mixed paper and cardboard which is now all dealt with in the UK.

\*SSDC is part of the Somerset Waste Partnership (SWP). Data relating to waste services is supplied by SWP and is not available at a district level.

\*\*The data supplied by SWP relates to the previous quarter and is a cumulative figure.



# Places Where We Live

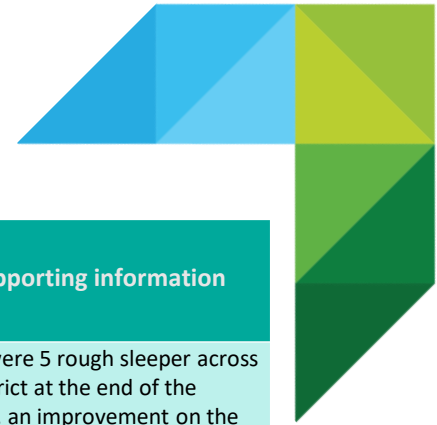


Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PWWL1	Homelessness Prevention (Quarterly)	Number of approaches	400	100	177	168	●	● →	<p>There were 168 applicants assessed during quarter 3.</p> <p>Preventative measures are being applied with a range of teams and funded organisations (e.g. Citizens Advice South Somerset) . This measure records the number of specific interventions taking place with these partners where SSDC are involved to help prevent homelessness</p>
PWWL2	Homelessness Prevention (Quarterly)	Number of successful preventions cases – cases where SSDC intervention or assistance has prevented an individual becoming homeless	40	10	16	18	●	● →	<p>There were 57 preventions during quarter 3, 18 of those were successful by either securing the existing accommodation for 6 months or alternative accommodation for 6 or 12 months</p>
PWWL3	Homelessness Prevention (Quarterly)	Number of successful relief cases	100	25	22	25	●	● →	<p>There were 100 cases where the relief duty ended in quarter 3, 25 of those were successfully relieved who successfully obtained accommodation for 6 or 12 months</p>
PWWL4	Homelessness Prevention (Quarterly)	Number and value of Discretionary Housing Payments (DHPs) paid	TBC	TBC	193 (cumulative)	246 (cumulative)	**	**	<p>The team are working through the backlog of DHPs, 284 applications have been processed this year to date and 246 of those were awarded a DHP. The cumulative amount paid to date is £186,481.06</p>

\*\* no RAG status for performance against target or direction of travel due to targets not being in place.



# Places Where We Live



Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
PWWL5	Homelessness Prevention (Quarterly)	Number of rough sleepers	0	0	13	5			There were 5 rough sleeper across the district at the end of the quarter, an improvement on the previous quarter but still some work to do.
PWWL6	Homelessness Prevention (Quarterly)	Number in Bed and Breakfast Accommodation	0	0	-	11		n.a.	This new measure for Q3 has been changed to number in Bed and Breakfast accommodation to more clearly show the number of individuals at risk of homelessness. SSDC have provision for 40 places within temporary accommodation, anything above this adds additional costs.
PWWL7	Housing (Quarterly)	Measures reporting the amount and type of support provided by SSDC to help prevent homelessness 1. Affordable housing completed = 103 2. Active Homefinder applications = TBC	1. 103 2. 400	1. N/A 2. = 100	1. N/A 2. 384	1. N/A 2. 2,248		n.a.	The number of affordable housing completed will be reported upon during 22/23 Q1. The Registrations Team have worked extremely hard to clear the backlog of applications, the number of live applicants on the system compared to last quarter is testament to this hard work.

\*\* no direction of travel due to no data in Q2 for comparison

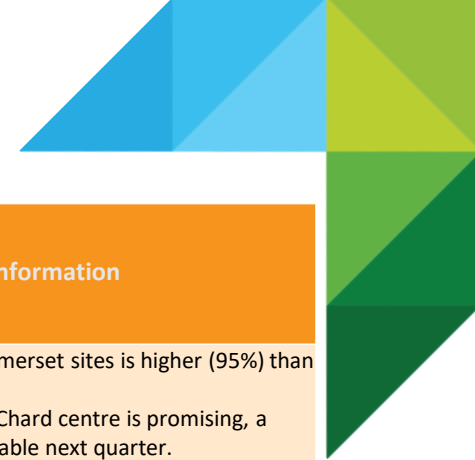


# Healthy, Self Reliant Communities

Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
HSRC1	Community Activities (Quarterly)	<ol style="list-style-type: none"> <li>Health walks - no. of events, no. of participants.</li> <li>Number of volunteers</li> <li>Play Days inc. Schools Out programme - no. of events, no. of participants *</li> <li>Other Community events - support or advice given</li> </ol>	<ol style="list-style-type: none"> <li>26, 9400</li> <li>40</li> <li>24, 10,000</li> <li>1</li> </ol>	-	<ol style="list-style-type: none"> <li>26, 2,066</li> <li>36</li> <li>12, 2,041</li> <li>1</li> </ol>	<ol style="list-style-type: none"> <li>0, 0</li> <li>40</li> <li>0, 0</li> <li>0</li> </ol>	●	●	<p>There are 26 established health walks with 36 active health walk leaders. A training event was held for new leaders and it is hoped that with Covid restrictions lifting the number of walks and attendees will increase in Q4. Planning is underway for schools out and play days for Q4, again these are dependant on Covid numbers and restrictions.</p>
HSRC2	Community Support (Quarterly)	<p>The number of and groups of people supported by SSDC (based on UK and SW demographic definitions) in terms of rebuilding inclusive communities and tackling inequality</p> <ol style="list-style-type: none"> <li>Support for vulnerable customers (No.)</li> <li>Community grants provided (No. &amp; £)</li> </ol>	<ol style="list-style-type: none"> <li>1,920</li> <li>10, £100,000</li> </ol>	-	<ol style="list-style-type: none"> <li>1,928</li> <li>11, £89,225</li> </ol>	<ol style="list-style-type: none"> <li>1,903</li> <li>4, £100,164</li> </ol>	●	●	<p>We are currently providing 24hr telecare support to 1903 vulnerable customers. This figure is slightly down on Q3 last year. 4 Community Grants (1x Sports, recreation and physical activity &amp; 3x Community Facility) have been awarded to projects in Q3. Total of £25,539 awarded with total project cost of £100,164. Active promotion of Careline will be starting in the new year with the launch of a dedicated website. The team are aware that the vaccination programme will have an impact on their work during Q3 and Q4.</p>



# Healthy, Self Reliant Communities



Ref	Measure (frequency of reporting)	Description	Annual Target 21/22	Quarterly Target	Previous Quarter (Q2)	Current Quarter (Q3)	Perf against target	Direction of travel	Supporting information
HSRC3	Freedom Leisure (FL) Community Measures (Quarterly)	<ol style="list-style-type: none"> <li>1. Participation, membership and service improvement</li> <li>2. Active communities</li> <li>3. Access to physical and social health &amp; wellbeing activities, events and support programmes (including tailored physical activity opportunities)</li> </ol>	TBC	-	-	See supporting information	●	●	<p>Participation % return at South Somerset sites is higher (95%) than national average currently (75%).</p> <p>Usage trends demand at the new Chard centre is promising, a more detailed update will be available next quarter.</p> <p>Demand for swim school is high currently in line with national trends.</p> <p>The Active Communities programme is in its infancy but good early progress has been made in reaching out beyond centres and in securing additional funding to support delivery in this area. The Active Communities Coordinator is in place. - In their initial two months in post they have reached a total engagement footfall of 261 which is a respectable achievement. Consultation currently underway to shape the active communities plan for 2022. £10k secured from public health for local delivery in this area.</p>



# Equality Impact Relevance Check Form



The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. This tool will identify the equalities relevance of a proposal, and establish whether a full Equality Impact Assessment will be required.

What is the proposal?	
Name of the proposal	Corporate Plan, annual action plan 2022-23
Type of proposal (new or changed Strategy, policy, project, service or budget):	Updated strategy and projects.
Brief description of the proposal:	A plan that sets out SSDCs priority projects and underpinning objectives
Name of lead officer:	Jessica Power

You should consider whether the proposal has the potential to negatively impact on citizens or staff in the following ways:

- Access to or participation in a service,
- Levels of representation in our workforce, or
- Reducing quality of life (i.e. health, education, standard of living)

A negative impact is any change that could be considered detrimental. If a negative impact is imposed on any citizens or staff with protected characteristics, the Council has a legal duty to undertake a full Equality Impact Assessment.

Could your proposal negatively impact citizens with protected characteristics? (This includes service users and the wider community)	<b>NO</b>
Could your proposal negatively impact staff with protected characteristics? (i.e. reduction in posts, changes to working hours or locations, changes in pay)	<b>NO</b>

<b>Is a full Equality Impact Assessment required?</b>	<b>NO</b>
<b>If Yes,</b> Please provide a brief description of where there may be negative impacts, and for whom. Then complete a full Equality Impact assessment Form	
<b>If No,</b> Please set out your justification for why not.	
The corporate plan is a vision for the development of South Somerset. The 2022/23 Action Plan has a particular focus on initiatives that will tackle disadvantage and deliver positive outcomes for residents sharing protected characteristics - including our locally adopted protected characteristics of Rurality and Low income - i.e. supporting economic independence and helping people out of poverty, promoting health and wellbeing (including mental health), tackling poor social mobility and ensuring access to housing/affordable housing. Whilst a full EIA is not required for the overall Plan, the individual areas of focus and priority projects will require their own EIA to ensure compliance with the Public Sector Equality Duty.	
Service Director / Manager sign-off and date	Nicola Hix 01.02.2022
Equalities Officer sign-off and date	Dave Crisfield 1 <sup>st</sup> February 2022

## 2021/22 Revenue Budget Monitoring Report for the Period Ending 31 December 2021

Executive Portfolio Holder: Peter Seib, Finance and Legal Services  
SLT Lead: Karen Watling, Chief Finance Officer  
Lead Officers: Paul Matravers, Lead Specialist – Finance  
Hannah Brown, Specialist - Finance  
Contact Details: [paul.matravers@southsomerset.gov.uk](mailto:paul.matravers@southsomerset.gov.uk) or 01935 462275  
[hannah.brown@southsomerset.gov.uk](mailto:hannah.brown@southsomerset.gov.uk) or 01935 462473

### Purpose of the Report

1. The purpose of this report is to provide Members with the current projection of the forecast spending and income against the Council's approved Revenue Budget for the financial year, and to explain projected variations against budget.

### Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of 10 February 2022.

### Public Interest

3. This report provides Revised Estimates for this financial year based on revenue budget variations estimated for the 2021/22 financial year. It gives an explanation of the significant key variances and why budgets therefore need to be amended. It also incorporates the continuing impact that Covid-19 is having on the Council finances.
4. Maintaining the financial health and resilience of the organisation is important to ensure the ongoing delivery of priority services within our community. The Council also has a legal obligation to set and maintain a balanced revenue budget position.

### Recommendations

5. That the District Executive:
  - a. Notes the variances being forecast against the 2021/22 revised revenue budget agreed by Council in December 2021 as set out in Table One.
  - b. Notes the transfers made to date to and from reserves outlined in Table Three.
  - c. Notes the budget virements made under delegated authority as detailed in Appendix A.

d. Note the forecast year-end reserves position shown in Appendix B.

## Background

- The 2021/22 original net budget of £16.743m was approved by Council in February 2021. This represents the financial plans that the Executive manages, under their delegated authority and in accordance with the Financial Procedure Rules. All of the Council's income and expenditure has a responsible budget holder.
- The Quarter Two revenue budget monitoring report advised that an in depth review of the 2021/22 budget had been carried out to realign some historic budgets to reflect current spend and income. This exercise also identified additional budget requirements within some services. Council approved the 2021/22 revised net budget of £16.564m in December 2021.

## Summary of the Current Financial Position

- This report covers the period 1 April to 31 December and a summary of the year to date budget position is shown below in Table One, analysed by categories of expenditure and income. The table also provides a forecast outturn for 2021/22.
- As at the end of December 2021 the forecast revenue budget position is an **under spend** at year-end of **£298,140**, which is a **1.80% variance**.

**Table One: 2021/22 Year to-date figures and Forecast Outturn**

	Year to date - April to December 2021			Forecast Outturn 2021/22			
	Budget	Actual	Variance	Budget	Forecast	Variance	
<b>Expenditure</b>							
Employees	£15,104,856	£14,278,774	(£826,082)	£19,481,660	£19,311,940	(£169,720)	99%
Premises	£2,647,157	£2,452,008	(£195,149)	£3,326,560	£3,302,620	(£23,940)	99%
Transport	£539,823	£473,401	(£66,422)	£825,340	£795,320	(£30,020)	96%
Supplies & Services	£6,420,045	£6,602,063	£182,018	£8,036,560	£8,012,050	(£24,510)	100%
Third Party Payments	£6,194,190	£6,285,573	£91,383	£8,606,320	£8,606,570	£250	100%
Housing Benefits payments	£18,350,770	£19,374,263	£1,023,493	£24,688,360	£24,688,360	£0	100%
Capital Financing	(£1,804,455)	£39,149	£1,843,604	£272,690	£214,920	(£57,770)	79%
Revenue Reserve transfers	(£1,521,472)	(£273,531)	£1,247,942	£1,029,970	£1,029,970	£0	100%
	£45,930,914	£49,231,701	£3,300,787	£66,267,460	£65,961,750	(£305,710)	100%
<b>Income</b>							
Government grants	(£20,907,273)	(£20,814,639)	£92,633	(£27,614,610)	(£27,614,610)	£0	100%
Other grants and contributions	(£590,855)	(£1,108,561)	(£517,706)	(£1,444,510)	(£1,341,720)	£102,790	93%
Sales	(£1,288,144)	(£1,418,760)	(£130,616)	(£1,691,090)	(£1,597,390)	£93,700	94%
Fees and charges	(£12,946,540)	(£14,165,096)	(£1,218,556)	(£16,980,050)	(£17,126,490)	(£146,440)	101%
Investment income	(£856,933)	£343,684	£1,200,616	(£1,973,230)	(£2,015,710)	(£42,480)	102%
	(£36,589,744)	(£37,163,373)	(£573,629)	(£49,703,490)	(£49,695,920)	£7,570	100%
<b>Net Budget</b>	<b>£9,341,169</b>	<b>£12,068,328</b>	<b>£2,727,158</b>	<b>£16,563,970</b>	<b>£16,265,830</b>	<b>(£298,140)</b>	<b>98%</b>

(Variance column: bracketed figures = underspend / surplus income, unbracketed figures = overspend / income shortfall)

- Managers have provided a forecast of expenditure and income for the year for their service area as part of their management responsibilities and in line with good



## South Somerset District Council

financial management and financial procedures rules. This report is a high-level summary of the budget variances that managers have forecast against the Revised Estimate agreed in December 2021.

### Employees

11. The Arts & Entertainment and Countryside budgets are continuing to be impacted by the effects of COVID, there are reduced staffing requirements in these areas. There are also vacancies across a number of the services, which are contributing to the forecast underspend.

### Premises

12. The majority of the forecast underspend of £24k relates to the Arts and Entertainment budgets where reduced expenditure is expected as these facilities have not been operating at normal capacity.

### Transport

13. These budgets are showing an anticipated underspend of £30k which is in respect of fleet related insurance premiums.

### Supplies and Services

14. This category of expenditure covers a wide range of costs. An element of the current forecast underspend of £25k relates to the Arts and Entertainment budgets arising from reduced performance costs as a result of venue closure due to COVID-19.

### Housing Benefit payments

15. The actual position to date is an over spend of £1m: however, this is a timing issue between SSDC making the payments and the government giving us the Housing Benefit Subsidy Grant. It is anticipated that the spend relating to rent allowances will be in line with budget at year-end.

### Other grants and contributions

16. The additional grants received in excess of the original budget have now been incorporated into the revised budget estimates:
  - Sports Council England - £181k;
  - The Arts Council - £115k;
  - National Lottery Heritage Fund - £36k
  - The Cultural Recovery Fund - £35k.
17. The budget forecast shows a shortfall of £103k, which is the impact of some reductions in funding contributions from external bodies.

18. Following the budget revision there is still a shortfall in sales income of £94k: this mainly relates to reduced catering sales of £56k at the Octagon and Westlands; and a reduction in advertising sales within the Tourism & Heritage budgets. The reduction in sales income is offset by an increase in fees and charges income referred to in the following section.

### Fees and charges

19. The fees and charges position to date is showing a surplus of £146k against the budget. The Arts and Entertainment admission charges have performed better than anticipated contributing £251k towards this surplus. An additional £100k has been secured through property letting at Brympton Way.

20. There is however, an income shortfall of £237k against legal fees and costs recovered within Revenues. The debt recovery timetable has not been fully resourced for some time, due to staff resource being redirected to the administration of business grants. Although it is unlikely that any income will be received against this budget this year a growth proposal has been put forward to address this issue in 2022/23.

### Investment income

21. The adverse variance showing to date in Table One is a timing issue and relates to accrued income which the Council will receive this year but has not received to date. The year-end projection forecasts a surplus of £42k which is marginally above the revised budget. The variance is mainly in respect interest receivable on the treasury investments.

## Quarter Three revenue budget position for each service

22. Table Two below reflects the current and forecast budget position, for each service directorate.

**Table Two: 2021/22 Year to-date figures and Forecast Outturn**

	Year to date - April to December 2021			Forecast Outturn 2021/22		
	Budget	Actual	Variance	Budget	Forecast	Variance
Chief Executive	£479,010	£733,995	£254,985	£635,910	£635,910	£0
Commercial Services	(£928,058)	£511,263	£1,439,321	£3,569,210	£3,136,490	(£432,720)
Place & Recovery	£303,625	£455,439	£151,814	£213,740	£213,740	£0
Strategy & Support Services	£6,284,458	£6,962,379	£677,921	£7,980,700	£7,969,630	(£11,070)
Service Delivery	£3,202,134	£3,405,252	£203,118	£4,164,410	£4,310,060	£145,650
	<b>£9,341,169</b>	<b>£12,068,328</b>	<b>£2,727,158</b>	<b>£16,563,970</b>	<b>£16,265,830</b>	<b>(£298,140)</b>

(Variance column: bracketed figures = underspend / surplus income, unbracketed figures = overspend / income shortfall)

## Budget Virements



## South Somerset District Council

23. Under the Financial Procedure Rules, providing that the S151 Officer has been notified in advance, Directors/Managers may authorise any virements for an individual cost centre within their responsibility. Directors and Managers can authorise virements, up to a maximum of £50,000, for an overall Directorate that is within their area of responsibility. Portfolio Holders can approve virements between services within their areas of responsibility, up to a maximum of £50,000 per virement.
24. SLT has however adopted a protocol that all use of reserves, that do not require approval of the District Executive, will, despite the delegations given to officers described above, be reviewed by SLT first before the reserve is used. The Financial Procedure Rules will be changed to incorporate this for 2022/23.
25. All virements outside of the criteria set out above require the approval of District Executive. The virements that fall outside of this criteria are detailed in Table Three below.

**Table Three: Virements requiring approval**

<b>Value</b>	<b>Service function</b>	<b>From</b>	<b>To</b>	<b>Description</b>
£213,740	Voluntary, Community and Social Enterprise	Strategy & Support Directorate	Place & Recovery Directorate	Transfer of function to Place & Recovery Directorate

### Council Tax Support and Council Tax

26. The Council Tax Support Scheme (CTS) provides for discounted tax charges to households with lower incomes. The Authority has set an estimate for 2021/22 of £10.402m within the Council Tax Base for annual CTS discounts, and total of £10.363m has been allocated as at the 31 December 2021. The cost of the CTS is allocated through the Council Tax Collection Fund and is shared between the preceptors in proportion to their relative shares of council tax due for the year (SSDC share is 14.13% for 2021/22).
27. The Hardship Scheme is in place for extreme circumstances with a budget of £30k for the year. By the end of December 2021, SSDC had processed 89 applications of which 68 were successful; the amount awarded was £25.5k.
28. The in-year collection rate for Council Tax for this time period is 80.60% for 2021/22 compared to 81.55% for the same period last year. At the end of December 2021, the total of £13.479m outstanding debt relating to previous years had been reduced by £2.775m.

### Business Rates

29. The in-year collection rate for Business Rates for this time period is 73.15% for 2021/22 compared to 77.87% for the same period last year. The downturn in collection is due to the impact of COVID-19 on the local economy. At the end of



## South Somerset District Council

December 2021, the total of £5.502m outstanding debt relating to previous years had been reduced by £1.012k.

30. Non Domestic Rates income that the Council collects is distributed between Central Government, SSDC, Somerset County Council and the Fire and Rescue Authority under the Business Rates Retention funding system.
31. 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 existing pooling arrangement will remain in place through 2022/23.

### Earmarked Reserves

32. The Council holds earmarked revenue reserves for a variety of good financial management reasons. Some reserves are for specific expenditure that will occur in the future, some reserves are held to mitigate possible risk, and others are reserves specifically built up over the past to help support the Medium Term Financial Plan. We also hold reserves for each Area Committee. Earmarked reserves are either revenue reserves (which can be used to fund both revenue and capital expenditure) or capital reserves which, unless the Secretary of State gives the council a specific dispensation, can only be used to fund capital expenditure.
33. Table Four below shows all the transfers that have been actioned for the year to date under the delegated authority given in the Financial Procedure Rules.

***Table Four: Transfers made (into) and out of Earmarked Reserves***



# South Somerset District Council

Reserve	Balance at 01/04/2021 £'000	Transfers £'000	Balance at 31/12/2021 £'000	Reason for Transfer
<b>Capital</b>				
Usable Capital Receipts	(18,073)	(60)	(18,133)	Receipt of repaid grants
<b>Revenue</b>				
<b>Actions agreed by Council in December 2021</b>				
Transformation Reserve	(91)	91	0	This reserve has now been deleted and the balance transferred to the new Somerset LGR Reserve.
Somerset LGR reserve	0	(191)	(191)	This is a new reserve that has been created, the £91k has come from the Transformation Reserve and £100k has been transferred from the MTFP Support Fund.
Yeovil Refresh Reserve	(112)	112	0	This reserve has now been deleted and the balance transferred to the Regeneration Reserve.
Regeneration Fund	(2,997)	(112)	(3,109)	See above
NNDR Volatility Reserve	(4,593)	4,593	0	The reserve has now been deleted and the balance transferred to the MTFP Support Fund.
MTFP Support Fund	(4,880)	(4,216)	(9,096)	
Area Committees	0	(113)	(113)	The Area Committee balances have been transferred from the General Fund Balance.
Deposit Guarantee Claims Res	(13)	13	0	The reserve has now been deleted and the balance transferred to the General Fund Balance.
Park Homes Replacement Reserve	(287)	287	0	As above
Planning Obligations Admin Res	(30)	30	0	As above
Health Inequalities Reserve	(31)	31	0	As above
Insurance Fund	(50)	50	0	As above
<b>Other reserve transfers</b>				
Capital Reserve	(1,164)	(10)	(1,174)	Receipt of photovoltaic income.
Internal Capital Loan Repayments	(321)	321	0	The balance on this reserve has been transferred to the MTFP Support Fund.
Revenue Grants Reserve	(7,043)	6,590	(454)	Funding of COVID business grants.
Revenues & Benefits Reserve	(1,290)	102	(1,189)	Funding for transitional resources (£168k) less revenues new burdens grant received (£66k) transferred to reserve.
Business Support Scheme (Flooding)	(101)	10	(91)	Transfer to fund the costs associated with the River Parrett Trail
Ticket Levy Reserve	(120)	(55)	(175)	Ticket levies to reserve movements.
Community Safety Reserve	(44)	19	(25)	Funding of the Yeovil One Co-ordinator.
Housing & Homelessness Reserve	(441)	68	(373)	Funding of temporary staffing in 2021/22.
Spatial Policy Reserve	(258)	14	(244)	Transfer of Neighbourhood Planning Grant into reserves (£20K), less funding of a Planning post (£34K).
Climate Change Fund	(167)	(158)	(325)	Funding of staffing involved in this project £105k and an increase in reserve funding of £262k from the MTFP Support Fund.
Community Initiatives Reserve	(163)	163	0	Funding of the YR2 Somerset Families Programme as agreed by District Executive in October 2021.
Community Resilience Reserve	(126)	(100)	(226)	Grants allocated to fund future community resilience projects.

(Bracketed figures = balance or transfer into reserve, unbracketed figures = transfer from reserve)

34. The Chief Finance Officer along with SLT colleagues has undertaken a review of the reserves position and have recently implemented enhanced monitoring arrangements to better forward forecast the use of reserves. The forecast position as at the end of this financial year is shown in Appendix B.

## General Fund Balance

35. The General Fund Balance, comprises of an unallocated revenue reserve available to be used for unforeseen risks and costs. The year-end balance is forecast to be £4.656m.





36. The current assessment of the minimum balance requirement is £2.8m. It is advisable to continue to hold a balance above this minimum to provide headroom and flexibility to manage risk and to avoid falling below recommended levels. A review of the minimum level balance requirement will be undertaken and reported in the February 2022 Budget Report.

### Summary of Overall Forecast Reserves Position

37. The Council held £60.886m in capital and revenue reserves as at the beginning of this financial year. Taking into account anticipated expenditure that is funded by reserves in the remaining part of 2021/22 the year-end balance of reserves is forecast to be £29.372m. This figure includes the general fund balance of £4.656m

38. The key transfers into and out of the reserves during this year are as follows:

- Transfer of Business Rated Pooling Gain of (£0.8m - estimated figure) **into** the Regeneration Fund.
- Transfer of New Homes Bonus (£1.2m) **into** the MTFP Support Fund.
- Transfer of received Covid grants (£1.1m) **into** the Covid Recovery Reserve and the Covid Grant Reserve to fund Council Expenditure.
- **Use of** Capital Receipts Reserve (£18m) to fund Octagon Theatre Project and other 2021/22 capital expenditure.
- Use of revenue earmarked reserves (£3.5m) to fund 2021/22 capital expenditure (Capital Fund, Regeneration Fund, Commercial Investment Risk Reserve, and Cremator Replacement Capital Reserve).
- **Use of** Businesses Rates S31 Grants Reserve (£11.7m) to fund Collection Fund deficit.

### Financial Risks

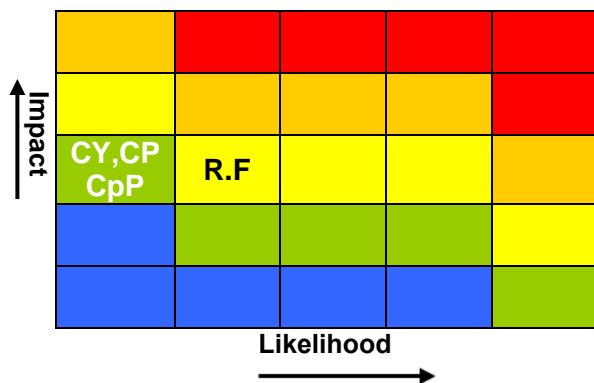
39. As part of monitoring, an assessment of risk has been made and details of the current key risks are listed below with an update from the responsible officer.

Current Risk	Responsible Officer	Officer's Update
Interest Rates	Chief Finance Officer	Interest rates remain low but there is a strong possibility of a future increase in the bank rate due to rising inflation rates. Regular meetings with our external Treasury Management advisers are held to inform us of the potential risks and any need for action.
Level of borrowing needs	Chief Finance Officer	Recent and ongoing deep dive financial reviews on the council's regeneration programme have identified an increased need to borrow to fund the capital expenditure required. The Chief Finance Officer made a number of recommendations in the quarter 2 capital budget monitoring report to reduce SSDC's borrowing needs by the use of earmarked reserves to fund capital expenditure plans. These recommendations were agreed by Full Council on 16 <sup>th</sup> December 2021.

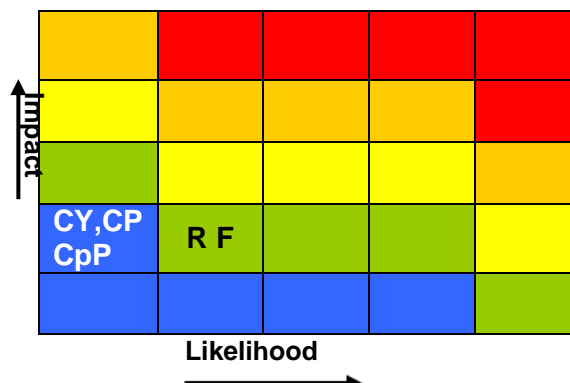
Current Risk	Responsible Officer	Officer's Update
Increase in Pay Award above amounts assumed in the Council's budget	This issue is a national one	This year's pay award for local government services employees remains unresolved as the unions have rejected the National Employers' full and final one-year pay offer that covers the period 1 April 2021 to 31 March 2022. The employers' offer will increase the bottom pay point by 2.75 per cent and would increase all other pay points by 1.75 per cent. The higher increase on the bottom pay point will ensure that the sector is compliant with the statutory National Living Wage of £9.50 that will come into effect on 1 April 2022. However, negotiations on any pay award for 2022-23 do not form part of this year's dispute and will be considered separately once the pay award for 1 April 2021 has been finalised. The unions have confirmed the timetable for their industrial action ballots, which will take place over the next three months.
Business Rate Income	Director-Service Delivery	The collection rate is down by 4.71% compared to the same period in the previous year quarter 3. This is a volatile measure affected by the timing of summonses and payments made by large businesses.
The Council Tax Support Scheme	Director-Service Delivery	The original budget for 2021/22 is £10.402m and a total of £10.363m has been awarded as at 31 December 2021. If costs exceed the assumption in the Council Tax Base this recovery risks a deficit in the Collection Fund to be paid in subsequent years in proportion to precept totals.
Housing Benefit Subsidy	Director-Service Delivery	Current predictions are for the housing benefit subsidy to be on budget at the year-end but the outcome will not be confirmed until the subsidy claim is externally audited in autumn 2022.
Covid-19 and particularly its impact on income budgets	Senior Leadership Team	We continue to monitor the effects of the pandemic on our service provision and budget and particularly on our income from car parking charges, planning fees, Council Tax and Business Rates. SSDC holds sufficient reserves to compensate for any income shortfalls in the short to medium term.

## Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key



<b>Categories</b>	<b>Colours</b> (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

40. The budget is closely linked to the Council Plan, and maintaining financial resilience and effective resource planning is important to enable the Council to continue to fund its priorities for the local community.

## Carbon Emissions and Climate Change Implications

41. There are no implications currently in approving this report.

## Equality and Diversity Implications

42. When the budget was set any growth or savings made included an assessment of the impact on equalities as part of that exercise.

## Privacy Impact Assessment

43. There is no personal information included in this report.

## Background Papers

Budget Setting reports to Full Council in February 2021.

Quarter One 2021/22 Budget Monitoring report to District Executive in September 2021

Quarter Two 2021/22 Budget Monitoring report to District Executive in December 2021

## Appendix A

The following virements should be noted:

Value	From	To	Description
£27,550	Central Support Services	Support Services Case Officers	Transfer of budget to salaries
£600	Area Development West	Economic Development	Cover Footfall counter project
£9,030	Learning & Development	Various	Allocation of training budget

**Usable Reserves 2021/22 Year End Forecast**

Appendix B

Service	Reserves	Balance as at 31/03/2021 £'000	2021/22	2021/22	Estimated
			Estimated Transfers IN £'000	Estimated Transfers OUT £'000	Balance as at 31/03/2022 £'000
Corporate Capital Programme	Usable Capital Receipts	-18,073	-10	16,172	-1,911
	Internal Borrowing Reserve (Vehicle Purchases)	-149	0	0	-149
	<b>Corporate earmarked capital reserves total</b>	<b>-18,222</b>	<b>-10</b>	<b>16,172</b>	<b>-2,060</b>
Somerset Local Government Reorganisation	Somerset LGR Reserve	-91	-100	191	0
	<b>LGR Total</b>	<b>-91</b>	<b>-100</b>	<b>191</b>	<b>0</b>
Commercial Services & Income Generation	Commercial Investment Risk Reserve	-6,606	-137	382	-6,361
	Cremator Replacement Capital Reserve	-549	0	0	-549
	Yeovil Athletic Track Repairs Fund	-198	-19	6	-211
	Artificial Grass Pitch Reserve	-162	-18	10	-170
	Waste Reserve	-100	0	0	-100
	YIC Maintenance Reserve	-40	-20	0	-60
	<b>Commercial Services Total</b>	<b>-7,654</b>	<b>-194</b>	<b>398</b>	<b>-7,450</b>
Place & Recovery	Regeneration Fund (including Yeovil Refresh Reserve)	-3,109	-811	1,276	-2,644
	Ticket Levy Reserve	-120	-15	0	-135
	COVID Recovery Reserve	0	-464	10	-454
	<b>Place &amp; Recovery Total</b>	<b>-3,229</b>	<b>-1,290</b>	<b>1,286</b>	<b>-3,233</b>
Service Delivery	Revenues and Benefits Reserve	-1,291	-66	572	-785
	Housing & Homelessness Reserve	-441	-95	238	-298
	Park Homes Replacement Reserve	-286	-30	316	0
	Business Support Scheme (Flooding)	-101	0	15	-86
	Closed Churchyards Reserve	-19	0	19	0
	Climate Change Fund	-167	-263	167	-263
	Community Housing Fund	-170	0	170	0
	Community Initiatives Reserve	-163	-140	303	0
	Community Resilience Reserve	-126	-247	344	-29
	Community Safety Reserve	-43	0	43	0
	Area Committee Reserves	-113	0	6	-107
	Planning Obligations Admin Reserve	-30	0	30	0
	Planning Delivery Reserve	-16	0	16	0
	Deposit Guarantee Claims Reserve	-12	0	12	0
<b>Service Delivery Total</b>	<b>-2,980</b>	<b>-841</b>	<b>2,251</b>	<b>-1,570</b>	
Support Services & Strategy	Bristol to Weymouth Rail Reserve	-72	0	72	0
	Spatial Policy Reserve	-258	-20	214	-64
	Election Reserve	-214	-40	0	-254
	Sports Facilities Reserve	-51	0	51	0
	Health Inequalities	-31	0	31	0
	IT Replacement Reserve	-10	0	0	-10
	<b>Support Services &amp; Strategy Total</b>	<b>-636</b>	<b>-60</b>	<b>368</b>	<b>-328</b>
Corporate Financial Reserves	COVID Grant Reserve for Council expenditure	0	-595	595	0
	Revenue Grants Reserve	-525	0	103	-422
	Business Rates S31 Grants 2020/21	-11,703	0	11,703	0
	NNDR Volatility Reserve	-4,592	0	4,592	0
	Medium Term Financial Plan Support Fund	-4,880	-6,462	2,491	-8,851
	Insurance Fund	-50	0	50	0
	Capital Reserve	-1,164	-3	1,167	0
	Treasury Management Reserve	-750	-50	0	-800
	Internal Borrowing Repayments (Vehicle repayments)	-321	-99	420	0
<b>Corporate Financial Reserves Total</b>	<b>-23,986</b>	<b>-7,209</b>	<b>21,121</b>	<b>-10,074</b>	
<b>Total Usable Earmarked Revenue Reserves</b>		<b>-38,576</b>	<b>-9,694</b>	<b>25,615</b>	<b>-22,656</b>
<b>General Fund Balance</b>		<b>-4,201</b>	<b>-455</b>	<b>0</b>	<b>-4,656</b>

N B This excludes the amount of £6.590m held by the Council as agent to the government for Covid Business Grants

## 2021/22 Capital Budget Monitoring Report for the Period Ending 31<sup>st</sup> December 2021

Executive Portfolio Holder: Peter Seib, Finance and Legal Services  
SLT Lead: Karen Watling, Chief Finance Officer  
Lead Officer: Anthony Morris, Specialist, Finance  
Contact Details: Anthony.Morris@southsomerset.gov.uk or (01935) 462317

### Purpose of the Report

1. The purpose of this report is to provide Members with a forecast of the 2021/22 year-end spend (“outturn”) against the Council’s approved Capital Programme Budget, and to explain projected variations against individual projects and the Programme as a whole.

### Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of February 2022.

### Public Interest

3. This report gives an update on the forecast capital financial position and budgetary variations for the financial year 2021/22, as at 31<sup>st</sup> December 2021. Maintaining effective control over capital spending within approved budgets helps to ensure capital investment is affordable and meets agreed priorities.

### Recommendations

4. That District Executive:
  1. Notes the contents of the report.
  2. Recommends to Full Council on 28<sup>th</sup> February 2022 to:
    - Increase the capital programme by £782k as set out in Table One, noting that £552k of this increase will be funded from Section 106 funds.
    - Remove £5.156m from the capital programme as described in paragraph 12 of this report.

### Background

5. Full Council approved the original Capital Programme in February 2021 and revised the programme budget at Full Council on 16<sup>th</sup> December 2021. Monitoring of the agreed programme is delegated to District Executive.

## Capital Programme

6. The forecast Capital Programme for this financial year and beyond is attached in Appendix A (this excludes proposed capital budget increases for 2022/23 that will be considered by District Executive at its meeting on 17<sup>th</sup> February 2022) The forecast outturn spend for 2021/22 is **£40.540 million**, an underspend of £2.425m from the **£42.965 million** approved by Full Council in December 2021. Table One below gives a summary of the movements.

**Table One – Forecast Capital Programme 2021/22 – 2025/26 as at Q3**

	<b>21/22</b>	<b>22/23</b>	<b>23/24</b>	<b>24/25</b>	<b>25/26</b>	<b>Total</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
<b>Capital Programme 2021/22 Revised Estimates approved by December Council</b>	<b>42,965</b>	<b>36,482</b>	<b>14,250</b>	<b>7,775</b>	<b>367</b>	<b>101,839</b>
<b>Projects seeking capital budget approval</b>						
5 x Isuzu Grafter Boxed Tipper	150					<b>150</b>
Affordable Housing – Gap funding from LA x 4 units Lyde Road	80					<b>80</b>
<b>Projects seeking capital budget approval (that are funded by S106)</b>						
West Coker Pavilion and Play Projects	300					<b>300</b>
Castle Cary and Ansford various projects		100				<b>100</b>
Henstridge PC – Ash Walk Rec	26					<b>26</b>
Crewkerne Aqua Centre	33					<b>33</b>
Gainsborough Play Area, Milborne	31					<b>31</b>
Lightgate Ln Playground S Petherton	62					<b>62</b>
<b>Proposals to remove from capital programme:</b>						
Budgets proposed to remove	(2,043)	(3,113)				<b>(5,156)</b>
Area allocation included in Yeovil Refresh regeneration project		(151)				<b>(151)</b>
<b>Project overspend:</b>						

	21/22 £'000	22/23 £'000	23/24 £'000	24/25 £'000	25/26 £'000	Total £'000
Yeovil Rec – J O'Donnell Pavilion Upgrade – funded by reserves	34					34
Commercial Investment Lease obligations future years		(560)	(438)			(998)
Re-profiling of forecast spending between financial years	(1,100)	964	136			0
<b>Forecast Capital Programme for 2020/21 at 31<sup>st</sup> December 2020</b>	<b>40,540</b>	<b>33,722</b>	<b>13,948</b>	<b>7,775</b>	<b>367</b>	<b>96,352</b>

(N.B. negative/bracketed figures = income/reduction in budget, positive figures = costs)

- The detail of the Capital Programme, showing all the projects included in the forecast budget is shown in Appendix A.

### Progress on various schemes

- Progress on individual schemes is attached on Appendix A, including responsible officer comments on the forecast spending profile between financial years and performance against targets.
- Within the current financial year **£28.043 million** has been spent up to the end of Q3, which is 69.2% of the total of **£40.540 million** projected for the year. The most significant areas of spend so far this year include:
  - £9.669m on Investment Properties
  - £7.813m on Commercial loans.
  - £7.799m on Regeneration schemes.
  - £841k on Disabled Facility and Home Repair grants.
  - £257k on the Yeovil Rec – J O'Donnell Pavilion Upgrade.
  - £319k on Affordable Housing projects.
  - £150k on 5 x Isuzu Box Tippers.
  - £130k on Westlands Building Improvement Works.
  - £112k on Area capital programmes.
- Some schemes have needed to be re-profiled between financial years. Eleven schemes have slipped into 2022/23 from 2021/22, at a value of £1.975m. The budgets for Wyndham Park (£400k) and the budget for Gas control system – Birchfields (£350k) have slipped from 2022/23 to future years. Budgets for some projects have been brought forward from future years to the current year and next to enable completion of the projects prior to the creation of the unitary authority. Re-profiling details are included in the table in Appendix B.





## South Somerset District Council Area Capital Programme

11. The Area Capital Programme details are contained in the main body of Appendix A in the final group. Table Two shows the schemes approved by the area committees during Q3 using part of the unallocated balances in the area totals.

**Table Two – Area Capital Programme Allocations**

	<b>£'000</b>
<b>Area North</b>	
Muchelney Church All Ability Accessible Toilet	13
<b>Area East</b>	
Wincanton Memorial Hall Toilet Facilities	6
<b>Area West</b>	
Combe St Nicholas Primary School Running Track	6
<b>Total Balance Allocated</b>	<b>25</b>

### Proposals for removal from the Capital Programme

12. The capital programme has been scrutinised during Q3 to identify any schemes that are unable to be completed and/or are non-essential given the scale of the capital programme that does need to be completed. The schemes recommended for removal from the capital programme are included in Appendix C.

### Decarbonisation Scheme

13. In the Quarter Two monitoring report it was mentioned that there was a risk that some of the approved budget for this year would not spend before the PSDS grant window closes and therefore SSDC was at risk of having to fund the expenditure itself. However the grant window has now been extended from March 2022 to June 2022 meaning that this potential risk has lessened.

### Capital Programme Financing

14. Sources of funding for the capital programme are shown in Table Three.
15. District Executive is reminded that Full Council agreed at its 16<sup>th</sup> December meeting to use all of SSDC's capital earmarked reserves to fund the existing capital programme and thus lower the borrowing needs of this council, and those of the new unitary council. That decision is fully reflected in Table Three.

**Table Three – Capital Programme Sources of Funding 2020/21 – 2024/25**

	<b>21/22</b>	<b>22/23</b>	<b>23/24</b>	<b>24/25</b>	<b>25/26</b>	<b>Total</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
<b>Specific Funding:</b>						
Grants & Contributions	9,126	9,385	8,937	3,664	151	<b>31,263</b>
Regeneration Fund (earmarked reserve)	659	1,107	0	0	0	<b>1,766</b>
Cremator Replacement earmarked reserve	0	549	0	0	0	<b>549</b>
Other Reserves	550	675	0	0	0	<b>1,225</b>
CIL Funding	0	1,335	0	0	0	<b>1,335</b>
Loan Repayments (capital receipts) from SSDC Opium Ltd and SWP	2,126	2,099	2,691	2,804	216	<b>9,936</b>
<i>Subtotal</i>	<b>12,461</b>	<b>15,150</b>	<b>11,628</b>	<b>6,468</b>	<b>367</b>	<b>46,074</b>
<b>Corporate Funding</b>						
Capital Fund (earmarked reserve)	1,167	1,666	0	0	0	<b>2,833</b>
Useable Capital Receipts	16,172	2,481	935	0	0	<b>19,588</b>
Borrowing	10,740	14,425	1,385	1,307	0	<b>27,857</b>
<i>Subtotal</i>	<b>28,079</b>	<b>18,572</b>	<b>2,320</b>	<b>1,307</b>	<b>0</b>	<b>50,278</b>
<b>Total Capital Programme Financing</b>	<b>40,540</b>	<b>33,722</b>	<b>13,948</b>	<b>7,775</b>	<b>367</b>	<b>96,352</b>

## Section 106 (S106) Deposits by Developers

16. S106 agreements are legal agreements between local authorities and developers that are linked to a planning permission. The total balance held at 31<sup>st</sup> December 2021 is **£5,937,415**. This is purely a whole district South Somerset District Council financial summary, more detail on S106's is given to Area Committees on an annual basis.
17. There have been six S106 funded projects added to the Q3 2021/22 capital programme, as detailed in Table One of this report.

18. Arrangements for the allocation of CIL receipts were agreed at the internal Strategic Development Board (SDB) in early September 2021. It was agreed to allocate CIL funds to already committed regeneration programme spend, only. With the following determination criteria being applied:

- Qualifies as a Priority Project in the SSDC Council Plan, Annual Action Plan 2021-22
- Meets the Council Plan, Annual Action Plan 2021-22, Themes (economy, environment, communities and places) Areas of Focus
- Makes a project deliverable that would otherwise not be able to be progressed
- Reduces the need for authority to borrow funds

19. The internal Strategic Development Board also agreed in early December 2021 to spend current CIL receipts as follows:

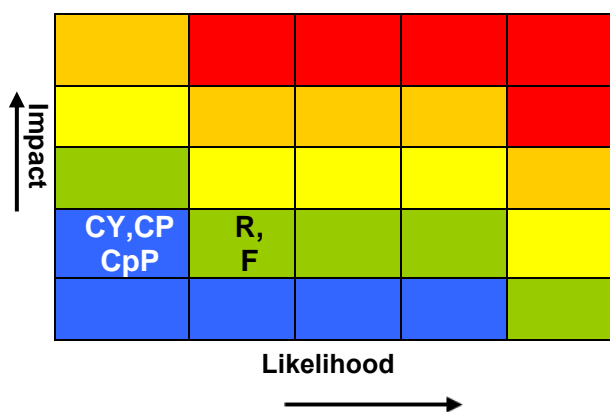
- A. £194,000 for Chard Leisure Centre Public Access project
- B. £1,141,000 for Yeovil Refresh 'Triangle' project

## Financial Implications

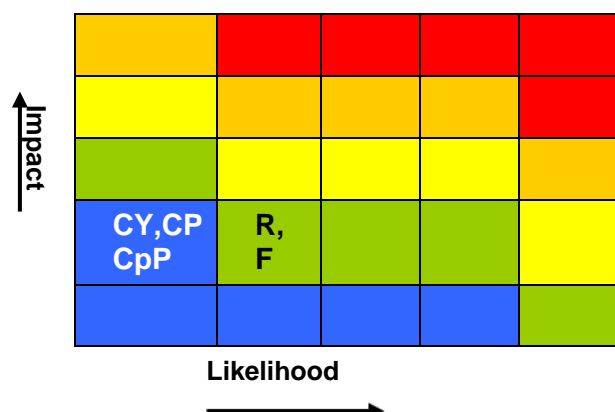
20. These are contained in the body of the report.

## Risk Matrix

**Risk Profile before officer recommendations**



**Risk Profile after officer recommendations**



### 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**

21. The capital budget funds many of the Council's key Corporate Actions.

### **Carbon Emissions and Climate Change Implications**

22. There are no specific implications in these proposals.

### **Equality and Diversity Implications**

23. There are no specific implications in these proposals.

### **Privacy Impact Assessment**

24. There is no personal information included within this report.

### **Background Papers**

Quarter Two Capital Budget Monitoring Report  
Capital Programme Budget report to Council in February 2021.

**Capital Programme 2021/22 - 2024/25**

Scheme	Overall Project Budget £000s	Spend in Previous Years £000s	2021/22 Revised Estimates £000s	Actual Spend to 31 December 2021 £000s	2021/22 Forecast Spend £000s	2022/23 Forecast Spend £000s	Future Years Unitary Authority £000s	Total Forecast Project Spend £000s	Forecast Underspend (-) / Overspend £000s	Status	Commentary
<b>COMMERCIAL SERVICES &amp; INCOME GENERATION</b>											
Westlands Building Improvement Works	800	74	125	130	130	521	0	725	-75	In progress	£125k spend in Q1-2 in 21/22. SLT sorting out capacity issues to deliver the project in 2022/23. Propose removing £80k from the budget for barrier and projection room which are not essential spend
Upgrade Joanna France Building	27	0	27	27	27	0	0	27	0	In progress	Licence with Athletics Club complete and works being completed against specification. Release of funds to Club due throughout Q.3
Fleetmaster Replacement - Fleet Management Software	57	0	57	0	57	0	0	57	0	In progress	Resources available to complete by March 2022 - needed ASAP
Access for all footpaths within various open Spaces	0	0	134	0	0	0	0	0	0	Cancelled	Propose removal from capital programme. Tarmac prices are too high to deliver original scope of programme. New council can include as part of new open space policy.
Riverside Park Planting Scheme	23	17	5	0	5	1	0	23	0	In progress	Covid 19 has continued to cause delays to project work at Riverside Park due to lack of volunteers on site and visitor pressure increasing the workload for the rangers. Currently in planting season so work will continue.
Ninesprings Café Extension	3	2	0	0	0	0	0	2	-1	Not in progress	Project cancelled due to lack of officer capacity and Covid delays. Recommend to Council to remove unspent budget.
Works to Chard Reservoir Dam & Outlets	18	0	15	6	15	3	0	18	0	Ordered & In progress	Topographical survey for Chard Reservoir and dam arrangement, review of on site Flood Plan and Completion of Final Measures in the Interests of Safety report all due by March 2022 from consulting engineers to satisfy Environment Agency requirements.
Installation of PV Panels on Ninesprings Café	10	2	0	0	0	0	0	2	-8	Not in progress	Recommend to Council to remove unspent budget. Scheme will proceed if new bid proposal for 22-23 under phase 2 of the decarbonisation project is agreed by Council
Yeovil Rec - J O'Donnell Pavilion upgrade	398	228	223	257	257	0	0	485	87	Completed	All practical building works complete. Facilities open and trading. Grant funding currently being drawn down to cover what is showing as overspend.
Installation of PV Panels on J O'Donnell Pavilion	30	0	30	0	0	0	0	0	-30	Not in progress	Recommend to Council to remove unspent budget. Scheme will proceed if new bid proposal for 22-23 under phase 2 of the decarbonisation project is agreed by Council
Battery Storage or LED Bulbs at Yeovil Rec	10	0	10	0	0	0	0	0	-10	Not in progress	Recommend to Council to remove unspent budget. Scheme will proceed if new bid proposal for 22-23 under phase 2 of the decarbonisation project is agreed by Council
Prior years' Commercial Lending		34,528	0	0	0	0	0			Completed	Loans made in line with agreed loan schedules – progress on individual projects linked to these reported within quarterly Investment Asset update reports to Executive.
Commercial Lending - OPIUM Fareham		0	8,430	7,813	8,430	0	0			In Progress	
Prior years' commercial property investments		83,943	202	202	202	0	0			Completed	Completed prior years commercial property acquisitions
Investment in Commercial Property - Costa Coffee		0	700	449	700	0	0			In Progress	Development including all professional fees. Commercial investment budget funded
Investment in Commercial Property - Lyndon House, Birmingham		0	2,663	2,654	2,663	0	0			Completed	Commercial investment budget funded
Investment in Commercial Property - Fitness First, Poole	150,000	2,726	5	5	5	0	0	139,657	-10,343	In Progress	Commercial investment budget funded
Investment in Commercial Property - St John's Retail Park		0	6,460	6,359	6,460	0	0			Completed	Commercial investment budget funded
Investment in Commercial Property - Trelleborg, Bridgwater		0	850	0	0	0	0			Propose removal	Propose removal from programme
Investment in Commercial Property - unspent balance to-date		0	0	0	0	0	0				
Sherwood Road, Bromsgrove (Capital works on existing commercial investment)	7	0	7	0	7	0	0	7	0	Capital Bid 2022-23	Minor works to boundary wall with Sherwood Road. Future provision for end of tenancy refurbishment not covered by dilapidations settlement
Alchemy, WGC (Capital works on existing commercial investment)	20	0	20	0	20	0	0	20	0	Capital Bid 2022-23	End of tenancy refurbishments not covered by dilapidations settlement
Trafalgar House, Taunton (Capital works on existing commercial investment)	5	0	5	0	5	0	0	5	0	Capital Bid 2022-23	Installation of low level wall in front of unit 1C/D to prevent Eagle Logistics reversing lorries over manhole. New mains supplied fire alarm and WC to unit 5 on tenant vacation.
King William House, Bristol (Capital works on existing commercial investment)	100	0	100	0	0	100	0	100	0	Capital Bid 2022-23	Installation of new lift, refurbishing GF WC, converting reception to bike store, Improved access to roofs, part replacement of roofs.
Lyndon Place, Birmingham (Capital works on existing commercial investment)	350	0	350	0	350	0	0	350	0	Capital Bid 2022-23	Proprietary leak prevention system, resolving car parking issue to include new fencing around parking. Move to 22/23
Yeovil Innovation Centre - 1st Floor Fit-Out	320	299	21	0	0	0	0	299	-21	Not in progress	Recommend to Council to remove from capital programme
Yeovil Innovation Centre - Car Park Extension	94	88	0	0	0	0	0	88	-6	Completed	Completed project.
Car Park Enhancements	235	207	28	0	0	0	0	207	-28	Propose removal	Propose removal from programme
New Car Parks	810	597	213	3	3	210	0	810	0	Including process for dem	Retain in capital programme - Millers Garage Crewkerne car park extension. Land was bought by SSDC for this. Has been very slow to progress. True costs may need more budget

Car Park Improvement Works	310	0	90	4	4	90	0	94	-216	Partially in progress	Some work on West Hendford is at tender stage. Linked to bid 2021-10 (£50k) as below. Remove element for replacing TMs with contactless etc. (£100k) as better dealt with postLGR? Defer work to damaged wall at Court Ash car park (£120k) due to lack of resources but continue to monitor. this sum should that situation change.
West Hendford Car Park Crime Reduction Improvements	50	0	50	10	50	0	0	50	0	In Progress	We have already installed a new CCTV system into the car park and designed and installed a bespoke infill panel for testing and approval purposes. The infill panels are to completely seal off the car park out of hours to remove serious ASB problems.
Enhancement to SSDC Bldgs	559	388	171	0	30	0	0	418	-141	Part in progress	Retain £30k for Brympton Way Covid enhancements. Recommend to Council to remove £141k from the capital programme
Brympton Way Building Improvement Works	105	21	84	82	82	0	0	103	-2	Not in progress	Recommend to Council to remove from capital programme
Capital Works to Council Portfolio	139	17	50	0	2	0	0	19	-120	Not in progress	Recommend to Council to remove from capital programme
Operational Buildings Improvement Works	165	0	65	0	0	0	0	0	-165	Propose removal	Propose to remove from programme
Decarbonisation of Operational Buildings	2,800	0	2,800	0	2,800	0	0	2,800	0	Partly in design, partly in progress	This is for phase 1 of the programme which is focusing on the leisure sites with the aim of having the heating and other works completed by March to make use of the grant funding available. A further capital bid for new capital budget in 2022/23 will be proposed to February 2022 Council for further work to SSDC's other operational buildings.
Land Drainage Maintenance Improvements	25	0	0	0	0	0	0	0	-25	Propose removal	Propose to remove from programme
District Wide CCTV Contribution to new system	25	0	25	0	25	0	0	25	0	Completed	Awaiting invoice from Sedgemoor
Digital Upgrade of Yeovil Town Centre CCTV Cameras	86	21	65	0	0	65	0	86	0	In Progress	We currently have 6 cameras inoperative which need the digital upgrade to sensibly rectify due to obsolescence issues. We could progress the remainder of the scheme as the funding allows as Sedgemoor have already carried out an appraisal report on our behalf. If the scheme does not progress more cameras will fail and become inoperative.
Birchfield Leachate Pumping Station	45	0	45	23	23	0	0	23	-22	Propose removal	Replacement kiosks have been installed. Propose to remove remaining budget.
Prigg Lane Garage Roof Renewal	10	0	13	13	13	0	0	13	3	In Progress	Spend anticipated to take place in 2021/22
Yeovil Small Business Centre Roof Renewal	65	0	0	0	0	65	0	65	0	Design	Required. Work likely to be summer 2022
Chard Business Park, Roadway Adoption	125	0	0	0	0	125	0	125	0	In Progress	All been designed but awaiting comments from county council highways department
Access Easement, Stoke Sub Hamdon	20	0	20	0	0	0	0	0	-20	Propose removal	Propose removal from programme
Demolition of Public Conveniences, West Street, Crewkerne	20	0	20	18	20	0	0	20	0	Completed	All work complete, remaining invoices to work through
Footbridge Assessment & Works	40	0	5	0	5	35	0	40	0	Definition	We have a number of footbridges across the district that we appear to have responsibility for. This project is on recognition that these bridges are not on an inspection regime and is to assess their condition and any repairs. It was envisaged this would be to employ a structural engineer consultant to carry out this work, It needs doing to ensure H&S of public using the asset but resources have prevented thus far.
Rowan Way Embankment Landslip	50	0	15	0	15	35	0	50	0	Design	This is a liability on a piece of land we own backing onto residential dwelling. Have been progressing this scheme but lack of resources have hindered progress. We now have a survey but we have difficulty with the consultant we had on board. Need to resolve and kick start. But the work itself would need to be done in the summer and unlikely to progress to final design and tender ready for that timeframe.
Lufton Depot Surfacing and Drainage Works	85	20	20	0	20	45	0	85	0	Scoping	Works progressing due to be completed as scheduled
DELETTI EV Charger Project	250	0	250	0	250	0	0	250	0	In Progress	This has been resource heavy due to difficulties with the legal documents. However, we are within touching distance with the Concession Agreement and the draft lease agreed. It is anticipated that we will be signing leases within the next 2/3 weeks for the first tranche of 4 and the other 23 sites (approx) will follow. Probably most spend will be in 2022/23 due to DNO timeframes but most will be committed by end of 2021/22
Yeovil Crematorium Refurbishment	4,100	1,190	1,405	31	305	2,605	0	4,100	0	In Progress	New Crematorium on order. Additional budget will be needed to complete original scope of the project. A report will come to Council in February giving the options available. Indications are that the extra budget required may be in the order of £820k
Petters Way Refurbishment	250	224	26	0	0	0	0	224	-26	Not in progress	Recommend to Council to remove from capital programme

Gas Control System - Birchfield	570	130	25	0	25	65	350	570	0	Design	Due to changes in Wessex Waters discharge consent criteria we will urgently need to fully investigate, design and construct a solution to the issue of dissolved methane in our discharge to the public sewer. It is likely that a methane stripping plant add on to our pumping station will be required. Last time this was considered, the estimated cost for this was around £300k. So recommendation is to move the £440k out of reserves and make it a live capital scheme for which delivery is prioritised. We have been monitoring the situation over the last few years as part of our management strategy but might need to collate more frequent monitoring data over a period of time including summer and winter conditions to correctly design the solution. Therefore whilst we will progress as priority, the final scheme may not be fully designed and installed by December 2022.
Contingency for Plant Failure	174	0	174	0	0	0	0	0	-174	Not in progress	Officers will commission a briefing note on the scale and condition of the equipment at the Birchfield site and any technical/engineering risks. The budget will not spend this financial year. Is this for wider Property portfolio sites?
ISUZU GRAFTER 35.125 (T) SWB E6 Boxed Tipper	30	0	0	30	30	0	0	30	0	Completed	
ISUZU GRAFTER 35.125 (T) SWB E6 Boxed Tipper	30	0	0	30	30	0	0	30	0		
ISUZU GRAFTER 35.125 (T) SWB E6 Boxed Tipper	30	0	0	30	30	0	0	30	0		
ISUZU GRAFTER 35.125 (T) SWB E6 Boxed Tipper	30	0	0	30	30	0	0	30	0		
ISUZU GRAFTER 35.125 (T) SWB E6 Boxed Tipper	30	0	0	30	30	0	0	30	0		
Trimax mower	13	0	13	13	13	0	0	13	0		
Telehandler - Merlo TF42.7	32	0	32	32	32	0	0	32	0		
Woodchipper Forst ST6p	15	0	15	15	15	0	0	15	0		
4.5 Tonne Compact Sweeper	76	0	76	76	76	0	0	76	0		
Iseki SF224 Mower	18	0	18	18	18	0	0	18	0		
<b>Total for Commercial Services &amp; Income Generation</b>	<b>163,689</b>	<b>124,723</b>	<b>26,252</b>	<b>18,392</b>	<b>23,309</b>	<b>3,965</b>	<b>350</b>	<b>152,346</b>	<b>-11,343</b>		
<b>SERVICE DELIVERY</b>											
Disabled Facilities Grants	2,771	0	750	841	1,228	1,543	0	2,771	0	In Progress	Brought forward previous year's grant of £1.228m. We have received a further £1.4m in 2021/22. Spend is delayed due to internal resources and contractor availability. Management are reviewing the project to try and address contractor shortfall. Currently looking to negotiate a SLA with SIP which legal are reviewing.
Careline Product Development	20	0	20	4	4	16	0	20	0	In progress	£9k spend on Website design work. Remaining to be spent on equipment
Empty Property Grants	1,324	1,263	61	0	0	61	0	1,324	0	In Progress	Grants continuing to be made as the need arises.
Home Repairs Assistance	1,405	1,386	48	19	19	0	0	1,405	0	Propose removal	Propose to remove remaining budget from the programme
Home Repairs Assistance 2021-22	20	0	30	0	0	20	0	20	0	In Progress	£20k retained for 22/23. Propose to remove remaining balance from the programme
HMO Grants	841	737	44	15	24	20	0	781	-60	In Progress	Current underspend predicted but reprofiled to 22/23 as more HMO visits completed
Barnabus House	45	23	22	0	22	0	0	45	0	In Progress	Works fully funded through MHCLG grant. Works delayed due to COVID; Phase 1 now complete. Phase 2 delayed pending outcome of planning application for Acacia Lodge
<b>LOCALITY (PHW)</b>											
Grant for Youth Facilities	5	0	0	0	0	5	0	5	0	In Progress	Talking to Horton about possible allocation
West Coker Pavilion and Play Projects	300	0	0	0	300	0	0	300	0	In Progress	Build phase started. In process of releasing S106 funding
Castle Cary and Ansford various projects	100	0	0	0	0	100	0	100	0	Planning	Ongoing S106 work
New Barns Wincanton	0	0	0	0	0	0	0	0	0	Planning	no budget allocated
Henstridge PC - Ash Walk Rec	26	0	0	26	26	0	0	26	0	Completed	
Crewkerne Aqua Centre	33	0	0	33	33	0	0	33	0	Completed	
Gainsborough Play Area, Milborne	31	0	0	31	31	0	0	31	0	Completed	
Lightgate Ln Playground S Petherton	62	0	0	62	62	0	0	62	0	Completed	
Wyndham Park Play Area Equipment	208	136	0	0	0	72	0	208	0	Scoping	S106 - Project to move to consultation phase in early 22. Unlikely to be delivered until 23.
Jarman Way, Chard - Play Area Equipment	42	14	28	0	28	0	0	42	0	Completed	Play area installed, build nearly complete. Invoices to process
Snowden Park Play Area Equipment, Chard	66	66	0	0	0	0	0	66	0	Completed	Project complete.
Ilminster Recreation Ground	44	0	44	0	44	0	0	44	0	Completed	Completed. Invoices to be paid.
Old Kelways Play Area, Langport	54	41	0	0	0	13	0	54	0	Planning	Priority project for next financial year
Flagship Play Area	142	119	8	8	8	15	0	142	0	In progress	Ship and tower refurbishments completed. Remaining to be spent on upgrading play area in 2022
Grant to Milborne Port Rec	136	37	0	0	0	99	0	136	0	In Progress	S106 - Working with MP Parish Council. Aim to spend in 22.
Langport Memorial Ground New Changing Facilities	7	3	0	0	0	4	0	7	0	Postponed	S106 - Aim to spend in 22.
Renewal of Skate Park provision in Area South	340	0	0	0	0	340	0	340	0	In progress	Company now allocated- Funding to be agreed with YTC and Capital bid to follow- All completed and installed by Nov 2022. On track for delivery. Consultation in Jan'Feb 22
Huish Episcopi Swimming Pool	509	438	71	0	71	0	0	509	0	In progress	Some S106 in. In discussion with Academy.
Forton Playing Pitches, Chard	85	86	0	0	0	0	0	86	1	Completed	This money have been fully spent and the land has been purchased. The intention is to develop this land for pitches when additional land is secured adjacent to this site through planning obligations.

Holyrood Sports Hall	20	17	3	0	3	0	0	20	0	Completed	Final payment made on this 23/7/2020. If there is further money remaining I would suggest that this is reallocated to offset some of the capital expenditure on the Chard Pool. If would have been strategic leisure obligations and therefore could be used for this purpose in my opinion, You might need Jackie Hamblin to confirm this.
Ilminster Cricket Club	52	17	0	0	0	35	0	52	0	Design	Finalising plans for Pavilion- ongoing discussions. S106 Aim to spend in 22
Caryford Community Hall	21	0	21	0	21	0	0	21	0	In progress	Phased project. Funding to be paid by year end. S106 Aim to spend in 22
South Petherton Cricket Club	34	29	0	0	0	5	0	34	0	Postponed	Contacting Parish Clerk for update. S106 Aim to spend in 22
Wyndham Park Community Facilities	400	0	0	0	0	0	400	400	0	Not in progress	To be funded by s106 money - Consultation to take place in 22. Unlikely to spend until 23
Home Farm, Somerton	298	0	298	0	0	298	0	298	0	Not in progress	This site was on our buildings at risk register. Budget required for repairs or compulsory purchase. Reprofile to 2022/23
Gypsy & Traveller Acquisition Fund	150	17	133	0	0	0	0	17	-133	Not in progress	Recommend to Council to remove from capital programme
Infrastructure & Park Homes Contingency	0	0	0	0	0	0	0	0	0	Not in progress	Propose to remove from the programme
<b>Subtotal for Service Delivery</b>	<b>9,591</b>	<b>4,429</b>	<b>1,581</b>	<b>1,039</b>	<b>1,925</b>	<b>2,646</b>	<b>400</b>	<b>9,400</b>	<b>-192</b>		
<b>PLACE</b>											
Chard Regeneration	19,964	10,393	7,783	6,511	7,783	908	433	19,517	-447	In Progress	Leisure Centre opened Nov 21. Chard HAZ & other public realm works progressing.
Yeovil Refresh	21,567	830	4,012	1,228	4,012	17,015	310	22,167	600	In Progress	Public Realm works commenced at Westminster Street, however, the contractor is likely to enter administration shortly which would mean the contract would need to be re-issued to another company, which could have financial implications. Major developments element of programme currently under review which may have consequential impacts on Future High Streets Fund grant and SSDC's overall capital budget and financing position. Currently discussing with Department for Levelling Up, Housing & Communities.
Octagon Redevelopment	23,015	0	730	3	730	1,698	20,587	23,015	0	In Progress	Project RIBA stage 2 Concept Designs complete - Construction targeted to commence Jan 2023. Finance report due to DX on 17th Feb.
Wincanton Regeneration	5,673	45	120	56	120	1,639	10	1,814	-3,859	In Progress	Regeneration Board decision not to continue with White Horse development. A report detailing the need to re-profile the budget to ensure delivery of those projects that are considered deliverable by Dec 22 is due to DX in February.
Affordable Housing - North Street, Crewkerne	1,040	780	0	234	234	26	0	1,040	0	In Progress	Phase 2 due to complete March 2023. This completion date is set by Homes England (Mar 31) and we align our grant funding with these dates. We have already paid 3/4 of the allocated grant at SOS and the final 1/4 to be paid upon PC.
Affordable Housing - 4 Properties Chard Working Mens Club (Stonewater)	216	162	54	0	54	0	0	216	0	In progress	Scheme now progressing well with completion set for Jun 2022
Affordable Housing - Gap funding from LA x 4 units Lyde Road	80	0	0	80	80	0	0	80	0	Completed	
Affordable Housing - The Link Day Centre	5	5	3	5	5	0	0	10	5	Completed	Scheme completed.
Affordable Housing - Unallocated	1,263	0	0	0	0	1,263	0	1,263	0	In Progress	Officer proposal to use £1.2m approved budget to grant fund a full passivhaus housing development with Stonewater at South Petherton to support the additional costs associated with this type of development (30 dwellings, 17 affordable, and 13 rent to buy). This is currently in planning and awaiting a decision (20/03071/FUL). This application was registered in October 20 but has been delayed due to phosphates issue although there has been some mitigations identified which will enable a decision soon. This would allow a start on site to be confirmed in 2022. Officers propose to seek approval to vire £600k of the budget to bought not built budget
Affordable Housing - Rural Contingency Fund	500	0	0	0	0	0	0	0	-500	Not in progress	Budget approved in September 2016. No spend to date as SSDC received Homes England Community Led Housing Fund monies in December 2016 so have used the grant first.
Affordable Housing - Bought not Built Allocation	1,532	0	0	0	19	390	0	409	-1,123	In progress	Acacia Lodge - homeless accommodation provision £390k and Southway Drive £19k
Affordable Housing - Mortgage Rescue Contingency Fund	277	0	277	0	0	0	0	0	-277	Not in progress	The spend hasn't progressed because of lack of capacity. Recommend removal from the capital programme
Investment in Market Housing	0	0	0	0	0	0	0	0	0	Not in progress	Propose to remove from the programme
Market Towns Vision	722	377	172	87	172	173	0	722	0	In Progress	Budget largely allocated but spend depends on towns finalising work and submitting invoices for grants allocated
<b>Subtotal for Place</b>	<b>75,854</b>	<b>12,592</b>	<b>13,151</b>	<b>8,205</b>	<b>13,208</b>	<b>23,112</b>	<b>21,340</b>	<b>70,252</b>	<b>-5,602</b>		
<b>SUPPORT SERVICES, STRATEGY &amp; COMMISSIONING</b>											
Organisational Performance Management and Appraisal / Engagement System	40	0	0	0	0	0	0	0	-40	Not in progress	Of limited value to invest in light of LGR. Recommend to Council to remove from capital programme
Leisure Centre Capital Works	3,495	0	100	79	239	3,256	0	3,495	0	In progress	April 2021 Council agreed to refurbish leisure centres as part of exercise of procuring leisure centre operators. Part of this sum was financed from previous Goldenstones and Wincanton capital budget of £924k



Lyde Road Pedestrian & Cycle Way, Yeovil	250	0	0	0	0	250	0	250	0	In Progress	Phase 1 is going ahead as planned and SCC Highways will be on site in April 2022. Part funded from Active Travel Grant (£150k) and section 106 monies.
Lyde Road Strategic Cycleway	129	0	0	0	0	129	0	129	0	In progress	Tendering process to start in Q4 2021/22 with works to complete in 2022/23
Lufton 2000, Yeovil - All Phases	1,520	1,280	26	26	26	214	0	1,520	0	Not in progress	Allowance for remedial works on sewer construction and highway s38 works. Retain provision. JV partner may be interested in buying us out.
Capitalised Salaries	3,181	3,031	150	0	150	0	0	3,181	0	In progress	Allocation of budget will be made in line with time spent on various capital projects.
Loan to Somerset Waste Partnership for Vehicles	5,000	4,125	875	0	875	0	0	5,000	0	In progress	Second draw down of loan will be 21/22.
E5 Upgrade	123	70	63	52	63	0	0	133	10	In progress	The upgrade of the financial system was completed in July, the outstanding items of the upgrade which are V1 Capture are Collaborative Planning are programmed to the implemented before the end of the financial year. Additional cost related to additional consultancy spend needed to enable elements to work correctly.
Firewalls & Security (Civica Upgrade)	41	30	15	15	15	0	0	45	4	Completed	
Omni-Channel Telephony	10	0	10	10	10	0	0	10	0	Completed	
Online Form Building Package (SX)	18	0	18	18	18	0	0	18	0	Completed	
Home Working Furniture	0	0	12	12	12	0	0	12	0	Completed	
ICT Replacement	36	0	36	0	36	0	0	36	0	Scoping	Proposal is to use remnant budget to enhance digital enablement at Lufton as the site lacks adequate office IT, fit for purpose conferencing facilities, and basic line of business and support applications are either very out of date, or don't exist at all.
Digital Capital Reserve Programme	135	0	135	61	135	0	0	135	0	Reliance on suppliers	Device standardisation £30k, security upgrade £15k, Upgrade DR capability £40k, Modern workplace £50k. On course to spend by year end. Reliant on suppliers (currently there is a
Transformation	22	0	22	0	0	0	0	0	-22	Not in progress	Recommend to Council to remove from capital programme
Meeting Room AV Upgrade	50	0	50	22	50	0	0	50	0	In progress	Purchase orders raised for new tech in the Yellow floor flexible meeting space & the delivery of a mobile conferencing facility. Once installed these will be used to inform how best to upgrade all meeting spaces to make them optimised for Teams and hybrid meetings. The remaining budget will be used to cover targeted improvements in multiple meeting rooms in BW and possibly at Petters and Lufton. Scheme has been delayed due to the global shortage of semi-conductors which as impacted on the supply chain.
<b>Subtotal for Support Services, Strategy &amp; Commissioning</b>	<b>14,050</b>	<b>8,536</b>	<b>1,512</b>	<b>295</b>	<b>1,629</b>	<b>3,849</b>	<b>0</b>	<b>14,014</b>	<b>-47</b>		
<b>AREA COMMITTEES</b>											
<b>AREA NORTH</b>											
Support of Economic Vitality in Area North (Signage for marketing programme)	20	17	3	0	3	0	0	20	0	in progress	Schemes prioritised which are community led and include additional partnership. Enquiries regarding brown signs have not come through to full application as they don't fulfil SCC criteria. Programme extended to include interpretation and business signage. £4,410 awarded and paid to Langport Town Council for signage Sept 19.
Hamdon Community Arts Project (HCAP)	13	0	13	0	13	0	0	13	0	in progress	Agreed at Area Committee w/e 24/04/20. The HCAP Committee have slowed down on the purchase of the former United Reformed Church. This is because their proposed business model, that they had in place to manage and maintain the property after purchase, has been radically effected by Government Covid restrictions. If in the future restrictions are removed and people return to normal behaviours regarding the use of galleries, theatres, rehearsal spaces etc., then the HCAP Committee will be in a stronger position to consider the proposed purchase
RAMA CIC	11	0	11	11	11	0	0	11	0	completed	Agreed at Area Committee w/e 14/04/21. Minibus purchased and capital element of grant paid. Grant offer £12,500 Capital funding £11,000 and revenue grants £1,500. This has now all been paid and completed
Langport Transport Group	6	0	6	0	6	0	0	6	0	In progress	Agreed at Informal Area Committee w/e 26/05/21.
South Petherton Tennis Club	13	0	13	13	13	0	0	13	0	completed	Agreed at Informal Area Committee w/e 26/05/21. Balance was paid on 19.10.21 so now completed
Long Sutton Cricket Club	13	0	13	0	13	0	0	13	0	In progress	Agreed at Informal Area Committee w/e 14/07/21. Project delayed until spring 22 due to supplier issues
Stoke Sub Hambdon Parish Council	17	0	17	0	17	0	0	17	0	In progress	Agreed at Informal Area Committee w/e 14/07/21.
South Petherton Bowls Club	13	0	13	10	13	0	0	13	0	In progress	Agreed at Informal Area Committee 24.3.21
Petherton Arts Trust	10	0	10	0	10	0	0	10	0	In progress	Agreed at Informal Area Committee 24.3.21
Kirkham Street Community Trust	13	0	13	0	13	0	0	13	0	scoping	Agreed at Informal Area Committee 24.3.21. The Community Trust is struggling to find further funding to reach the price for the land set by Somerset County Council
Muchelney Church All Ability Accessible Toilet	13	0	0	0	13	0	0	13	0	In progress	Agreed at AN committee Dec 21
Unallocated Budget North	0	0	51	0	38	0	0	38	0	0.00	
<b>AREA SOUTH</b>											
Yeovil to Ilchester Multi User Pathway-Feasibility	2	0	2	0	2	0	0	2	0	Cancelled	Scheme considered to be too expensive with major engineering works required. Return to feasibility phase to look at it again.
West Coker Commemoration Fund (WCCF)	7	0	7	6	7	0	0	7	0	completed	Approved at Area South Committee w/e 15/06/20. Project sill ongoing?? Accountancy informed in June that this was completed under budget and completed. Remaining funds can be transferred back to unallocated funding
Yeovil Refresh allocation	0	0	0	0	0	0	0	0	0	in progress	To be reviewed by Natalie F as part of broader programme.
Yeovil Swan Theatre Theatre Company	13	0	13	13	13	0	0	13	0	completed	Approved at Informal Area South Committee w/e 12/05/21. Full amount paid on 18th August. Project completed

Unallocated Budget South	136	0	36	0	36	100	0	136	0	0.00	Programme spend is dependant on eligible applications. Unlikely to spend entire budget by December 22 but could be allocated to a major scheme in Area South.
<b>AREA EAST</b>											
Wincanton-Pedestrian/Cycle Link Common Lane	6	1	5	0	5	0	0	6	0	in progress	Legal agreements finalised. Consultation with landowners on revised route has now been done in preparation for planning application. Preparing planning application. Conversations needed with WTC and WSG to determine priority and who will deliver.
Retail Support Initiative Schemes	5	4	1	0	1	0	0	5	0		Balance available to allocate.
9 Seat Minibus for Community Transport	12	0	12	0	12	0	0	12	0	in progress	Agreed at Area East committee 12/02/20. All funding secured but due to Covid 19 project delayed.
Mudford Memorial Village Hall	4	0	3	3	3	0	0	3	-1	Completed	Approved at Area East Committee w/e 16/10/20. Work to commence in spring of 2021. Project completed and paid for £2966. Accountancy informed 20.9.21 that project was underspent and remaining budget to be returned to unallocated funds
Parish Infrastructure Fund	4	0	4	0	4	0	0	4	0	in progress	Available for qualifying safety or housing projects. No spend in 2017/18.
Bruton Town Council - Weather Resistant Path	4	0	4	0	4	0	0	4	0	in progress	Agreed at Area East (informal) Committee w/e 19/5/21. Grant offer accepted. Awaiting claim.
Wincanton Memorial Hall Toilet Facilities	6	0	0	0	6	0	0	6	0		money to be spent buy Dec 2022
Radio Ninesprings	6	0	6	6	6	0	0	6	0	Completed	Agreed at Area East (informal) Committee w/e 19/5/21. Awaiting final invoices
Unallocated Budget East	0	0	71	0	65	0	0	65	0		Programme spend dependant of eligible applications. Likely to spend by December 22.
<b>AREA WEST</b>											
Chard Town Centre Gateway and Seating Area.	52	0	52	0	52	0	0	52	0		Provisional Allocation - may reduce. RIBA 3 design and costings completed, ITT out at the moment for RIBA 4 detailed design and costings. Team to be appointed by August 2020, work during September – December and works to begin in 2021. Likely to be second half of 2021
Ilminster Tennis & Bowling Club	13	0	13	13	13	0	0	13	0	Completed	Agreed at Area West Committee w/e 18/09/20. Project completed and paid
Horton Parish Council Playing Field Project	13	0	13	0	13	0	0	13	0	Completed	Agreed at Area West Committee w/e 20/11/20. Awaiting final invoices for payment
Ilchester Hall, Chiselborough	13	0	13	13	13	0	0	13	0		Agreed at Area West Committee w/e 20/11/20. Project ongoing
North Perrott Cricket Club	11	0	11	10	11	0	0	11	0	Completed	Agreed by Chief Exec w/e 29/01/21 Project completed. Accountancy informed in July that this is under budget and needs to be returned to unallocated funds
Chard Town Council - Market Stalls	6	0	6	6	6	0	0	6	0	Completed	Area West Markets Improvement Group (Nov 2010 committee). Awarded to Chard Town Council August 19, paid April 2021.
Hinton St George Pre-School Appeal	13	0	13	7	13	0	0	13	0	Completed	Agreed at Area West Committee w/e 19/5/21. Final invoices received
Dombe St Nicholas Primary School Running Track	6	0	0	0	6	0	0	6	0		Agreed at Area West Committee w/e 08/12/21
Radio Ninesprings	3	0	3	3	3	0	0	3	0	Completed	Agreed at Area West Committee w/e 19/5/21. Awaiting final invoices
Unallocated Budget West	74	0	24	0	18	50	0	68	0		
<b>Subtotal for Area Committees</b>	<b>544</b>	<b>22</b>	<b>469</b>	<b>112</b>	<b>469</b>	<b>150</b>	<b>0</b>	<b>641</b>	<b>-0</b>		
<b>Total Gross Capital Programme</b>	<b>263,727</b>	<b>150,301</b>	<b>42,966</b>	<b>28,043</b>	<b>40,540</b>	<b>33,722</b>	<b>22,090</b>	<b>246,653</b>	<b>-17,184</b>		

## APPENDIX B

### Re-profile of Forecast Spend

Scheme	2021/22 £'000	2022/23 £'000	Future Years £'000
Disabled Facilities Grant	478	136	(614)
Affordable Housing - Bought not Built Allocation	19	(19)	0
Leisure Centre Capital Works	139	(139)	0
Empty Property Grants	(61)	61	0
HMO Grants	(20)	20	0
Home Farm, Somerton	(298)	298	0
Wyndham Park Community Facilities		(400)	400
Careline Product Development	(16)	16	0
Westlands Building Improvement Works	5	(5)	0
Affordable Housing – North Street, Crewkerne	234	(234)	0
Gas Control System - Birchfield	0	(350)	350
King William House, Bristol (Capital works on existing commercial investment)	(100)	100	0
New Car Parks	(210)	210	0
Car Park Enhancements	(20)	20	0
Operational Buildings Improvement Works	(65)	65	0

<b>Scheme</b>	<b>2021/22 £'000</b>	<b>2022/23 £'000</b>	<b>Future Years £'000</b>
Access Easement, Stoke Sub Hamdon	(20)	20	0
Yeovil Crematorium Refurbishment	(1,100)	1100	0
<b>TOTAL</b>	<b>(1,100)</b>	<b>964</b>	<b>136</b>

(Detail of the re-profiling figure given at the bottom of the Table One)

(N.B. negative/bracketed figures = income/reduction in budget, positive figures = costs)

## Appendix C

### Schemes recommended for removal from the Capital Programme

Scheme	2021/22 £'000	2022/23 £'000	Total £'000	Comments
Westlands Building Improvement Works		(75)	(75)	Remove budget for barrier and projector room only – non essential. Budget for boiler retained.
Access for all footpaths within various open Spaces	(134)	(84)	(218)	Material prices increased too much to deliver original scope of project
Installation of PV Panels on J O'Donnell Pavilion	(30)		(30)	Subject to capital bid for phase 2 of decarbonisation project
Battery Storage or LED Bulbs at Yeovil Rec	(10)		(10)	Subject to capital bid for phase 2 of decarbonisation project
Yeovil Innovation Centre - 1st Floor Fit-Out	(21)		(21)	Project underspent therefore remaining budget not needed
Car Park Improvement Works	(86)	(130)	(216)	Deferral to new council for further consideration
Enhancement to SSDC Buildings	(141)		(141)	Deferral to new council for further consideration
Brympton Way Building Improvement Works	(2)		(2)	Deferral to new council for further consideration
Capital Works to Council Portfolio	(48)	(72)	(120)	Deferral to new council for further consideration
Petters Way Refurbishment	(26)		(26)	Deferral to new council for further consideration
Contingency for Plant Failure	(174)		(174)	If required there is a corporate contingency budget to cover
Gypsy & Traveller Acquisition Fund	(133)		(133)	Deferral to new council for further consideration
Affordable Housing – Mortgage Rescue Contingency	(277)		(277)	Historic budget no longer needed. If required there is a corporate contingency budget to cover
Transformation	(22)		(22)	Project complete
Investment in Market Housing		(731)	(731)	Insufficient time to achieve project in lifetime of SSDC
Infrastructure & Park Homes Contingency		(91)	(91)	If required there is a corporate contingency budget to cover
Affordable Housing - Unallocated		(392)	(392)	Unable to define spending plans and deliver before March 2023
Affordable Housing - Rural Contingency Fund		(500)	(500)	Unable to define spending plans and deliver before March 2023
Car Park Enhancements	(8)	(20)	(28)	Residue of budget not required.
Operational Buildings Improvement Works		(65)	(65)	Unable to define spending plans and deliver before March 2023

<b>Scheme</b>	<b>2021/22 £'000</b>	<b>2022/23 £'000</b>	<b>Total £'000</b>	<b>Comments</b>
Land Drainage Maintenance Improvements		(25)	(25)	Deferral to new council for further consideration
Birchfield Leachate Pumping Station	(22)		(22)	Requirements covered by other budgets
Access Easement, Stoke Sub Hamdon		(20)	(20)	Deferral to new council for further consideration
Home Repairs Assistance	(29)	(48)	(77)	Unable to define spending plans and deliver before March 2022. Capital bid for 2022-23
Home Repairs Assistance 2021-22	(30)	(10)	(40)	Unable to define spending plans and deliver before March 2022. Capital bid for 2022-23
Investment in Commercial Property - Trelleborg, Bridgwater	(850)	(850)	(1,700)	Advice from Treasury Management Advisers, is that scheme would not meet the requirements of the revised Prudential Code. Also full council agreed at its December 2021 meeting not to undertake any further investment for yield activity.
<b>TOTAL</b>	<b>(2,043)</b>	<b>(3,113)</b>	<b>(5,156)</b>	



## 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.

**Appendix A - SSSDC Executive and Council Forward Plan**

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
17 February 2022 28 February 2022	SSDC Annual Action Plan 2022/23	Portfolio Holder - Strategy & Housing	Director (Support Services & Strategy)	Jessica Power, Lead Specialist (Strategic Planning)	District Executive South Somerset District Council
17 February 2022 28 February 2022	Decarbonisation programme phase 2 proposals	Portfolio Holder - Environment	Director Service Delivery	Robert Orrett, Commercial Property. Land & Development Manager	District Executive South Somerset District Council
17 February 2022 28 February 2022	Options to refurbish Yeovil Crematorium	Portfolio Holder - Area South including Yeovil Refresh	Monitoring Officer	Jill Byron, Monitoring Officer	District Executive South Somerset District Council
17 February 2022 28 February 2022	Ensuring sufficient staffing capacity during 2022/23	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive South Somerset District Council



Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
17 February 2022 28 February 2022	Yeovil Refresh Finance	Portfolio Holder - Area South including Yeovil Refresh	Director Place and Recovery	Natalie Fortt, Regeneration Programme Manager	District Executive South Somerset District Council
17 February 2022 28 February 2022	Wincanton Regeneration Programme Finance	Portfolio Holder - Area East	Director Place and Recovery	Natalie Fortt, Regeneration Programme Manager	District Executive South Somerset District Council
17 February 2022 28 February 2022	Octagon Theatre Finance Report	Portfolio Holder - Health & Well-Being  Portfolio Holder - Finance, Legal & Democratic Services	Director Place and Recovery	Natalie Fortt, Regeneration Programme Manager	District Executive South Somerset District Council
17 February 2022 28 February 2022	2022/23 Budget Report	Portfolio Holder - Finance, Legal & Democratic Services	Chief Finance Officer	Karen Watling, Chief Finance Officer (S151 Officer)	District Executive South Somerset District Council
28 February 2022	Conclusion of Yeovilton and Limington Community Governance Review	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Angela Cox, Specialist (Democratic Services)	South Somerset District Council

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
28 February 2022	Council Tax Setting 2022 - 23	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Karen Watling, Chief Finance Officer (S151 Officer)	South Somerset District Council
28 February 2022	Statutory Pay Policy Statement for Chief Officers 2022/23	Portfolio Holder - Strategy & Housing	Chief Executive	Nicola Hix, Director (Support Services & Strategy)	South Somerset District Council
28 February 2022	Capital, Investment and Treasury Strategies 2022/23	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Paul Matravers, Lead Specialist (Finance)	South Somerset District Council
March 2022	Planning Re-imagined Update	Portfolio Holder - Protecting Core Services	Director Service Delivery	Kirsty Larkins, Director (Service Delivery)	District Executive
March 2022	Investment Assets Quarterly Dashboard	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Robert Orrett, Commercial Property. Land & Development Manager	District Executive
March 2022	Review of SSDC Commercial Strategy	Portfolio Holder - Economic Development including Commercial Strategy	Monitoring Officer	Jill Byron, Monitoring Officer	District Executive
March 2022 March 2022	Chard Shop Front Design Guide (Supplementary Planning Document)	Portfolio Holder - Area West	Director Place and Recovery	Anna Matthews, Chard High Street HAZ Project Manager	District Executive South Somerset District Council

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
March 2022	Briefing on Local Government Reorganisation (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive
April 2022	Annual review of the Regulation of Investigatory Powers Act 2000 (RIPA)	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Paula Goddard, Specialist (Legal Services)	District Executive
April 2022	Briefing on Local Government Reorganisation (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive
May 2022	Covid Recovery & Renewal Strategy annual progress report	Portfolio Holder - Strategy & Housing	Director Place and Recovery	Peter Paddon, Lead Specialist (Economy)	District Executive
May 2022	Quarterly Corporate Performance Report	Portfolio Holder - Strategy & Housing	Director (Support Services & Strategy)	Cath Temple, Specialist (Performance)	District Executive
May 2022	Briefing on Local Government Reorganisation (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
June 2022	Investment Assets Six Monthly update report	Portfolio Holder - Economic Development including Commercial Strategy	Director Commercial Services & Income Generation	Robert Orrett, Commercial Property. Land & Development Manager	District Executive
June 2022	Briefing on Local Government Reorganisation (Confidential)	Portfolio Holder - Strategy & Housing	Chief Executive	Jane Portman, Chief Executive	District Executive
July 2022	Capital & Revenue Budget Outturn reports for Quarter 4	Portfolio Holder - Finance, Legal & Democratic Services	Director (Support Services & Strategy)	Karen Watling, Chief Finance Officer (S151 Officer)	District Executive
July 2022	Briefing on Local Government Reorganisation (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 – February 2022

Purpose of Document	Portfolio	Director	Response to be agreed by	Contact	Deadline for response
<p><b>Arts &amp; Entertainment Service</b> - The Arts &amp; Entertainment service within South Somerset District Council is currently working to produce a 10-year strategy with the aim of improving access and opportunities to engage with arts and culture across the district.</p> <p>To better serve our community and reach those disengaged with the arts, we want to understand what the perceptions are of the arts in Somerset at the moment, peoples previous experiences attending or participating in arts and cultural events, and what communities would love to see happen in their local area.</p> <p><a href="https://consultation.southsomerset.gov.uk/arts-entertainment/arts-entertainment-in-south-somerset/">https://consultation.southsomerset.gov.uk/arts-entertainment/arts-entertainment-in-south-somerset/</a></p>	Health and Well-Being	Arts and Entertainment	This is an SSDC consultation	Adam Burgan, Arts and Entertainment Venues Manager	21 February 2022



## **Date of Next Meeting**

Members are asked to note that there will be a Special Meeting of the District Executive on **Thursday, 17<sup>th</sup> February 2022** as a virtual consultation meeting via Zoom meeting software commencing at 9.30 a.m.

The reports to be discussed are mainly finance and budget reports which will be forwarded to Council on 28 February 2022.

Members are also asked to note that the next meeting of the District Executive will take place on **Thursday, 3<sup>rd</sup> March 2022** 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 16) 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 (Confidential)**

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.