



CABINET

9 March 2022

A meeting of the CABINET will be held on Thursday, 17th March, 2022, 6.00 pm in Council Chamber, Marmion House, Lichfield Street, Tamworth, B79 7BZ

A G E N D A

NON CONFIDENTIAL

- 1 Apologies for Absence**
- 2 Minutes of Previous Meeting** (Pages 3 - 12)
- 3 Declarations of Interest**
To receive any declarations of Members' interests (pecuniary and non-pecuniary) in any matters which are to be considered at this meeting.

When Members are declaring a pecuniary or non-pecuniary interest in respect of which they have dispensation, they should specify the nature of such interest. Members should leave the room if they have a pecuniary or non-pecuniary interest in respect of which they do not have a dispensation.
- 4 Question Time:**
To answer questions from members of the public pursuant to Executive Procedure Rule No. 13
- 5 Matters Referred to the Cabinet in Accordance with the Overview and Scrutiny Procedure Rules** (Pages 13 - 14)
(Report of the Chair of Infrastructure Safety & Growth Scrutiny Committee)
- 6 New Vision and Corporate Plan 2022-2025** (Pages 15 - 42)
(Report of the Leader of the Council)
- 7 Regeneration Projects - consultancy support** (Pages 43 - 86)
(Report of the Leader of the Council)

- 8 Economic Development Service Workplan 2022 - 2025** (Pages 87 - 104)
(Report of the Portfolio Holder for Skills, Planning, Economy and Waste)
- 9 Council Housing Rent Accreditation** (Pages 105 - 148)
(Report of the Portfolio Holder for Homelessness Prevention and Social Housing)

Yours faithfully



Chief Executive

Access arrangements

If you have any particular access requirements when attending the meeting, please contact Democratic Services on 01827 709267 or e-mail democratic-services@tamworth.gov.uk. We can then endeavour to ensure that any particular requirements you may have are catered for.

Filming of Meetings

The public part of this meeting may be filmed and broadcast. Please refer to the Council's Protocol on Filming, Videoing, Photography and Audio Recording at Council meetings which can be found [here](#) for further information.

If a member of the public is particularly concerned about being filmed, please contact a member of Democratic Services before selecting a seat.

FAQs

For further information about the Council's Committee arrangements please see the FAQ page [here](#)

To Councillors: J Oates, R Pritchard, M Bailey, S Doyle, A Farrell and M Summers.



**MINUTES OF A MEETING OF THE
CABINET
HELD ON 17th FEBRUARY 2022**

PRESENT: Councillor J Oates (Chair), Councillors R Pritchard (Vice-Chair), M Bailey, A Farrell and M Summers

The following officers were present: Andrew Barratt (Chief Executive), Anica Goodwin (Executive Director Organisation), Stefan Garner (Executive Director Finance), Paul Weston (Assistant Director Assets), Adey Ramsel (Theatre, Artistic and Events Manager) and Tracey Pointon (Legal Admin & Democratic Services Manager)

Guests: Councillor R Claymore (Chair of Health & Wellbeing Committee) and Councillor S Pritchard (Vice Chair of Corporate Scrutiny)

109 APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor S Doyle, Councillor Farrell arrived at 18.04

110 MINUTES OF PREVIOUS MEETING

The minutes of the meeting held on 20th January 2022 were approved and signed as a correct record.

(Moved by Councillor R Pritchard and seconded by Councillor M Bailey)

111 DECLARATIONS OF INTEREST

There were no Declarations of Interest.

**112 MATTERS REFERRED TO THE CABINET IN ACCORDANCE WITH THE
OVERVIEW AND SCRUTINY PROCEDURE RULES**

Councillor Rosey Claymore Chair of the Health & Wellbeing Committee attended to update Cabinet in relation to two items discussed at the committee.

1. Update from the Midlands Partnership Foundation Trust (MPFT).

The Committee had raised the following motion:

That Cabinet consider the feasibility of producing 'wellbeing' portal on Tamworth Borough Council website linked to MPFT Communications Team

The Leader agreed that Cabinet accepts the recommendation

(Moved by Councillor J Oates and seconded by Councillor M Summers)

2. Reset & Recovery

The following motion was raised

The Committee recommends to Cabinet to consider another location other than that of the Assembly Rooms for interim, front of house customer services as quickly as possible.

Agreed that Cabinet would look at the options and Cabinet moved the following motion:

That Cabinet ensure that this is discussed as an agenda item at the next Reset & Recovery Board meeting on 23rd February and feed back to Health & Wellbeing Chair.

(Moved by Councillor J Oates and seconded by Councillor M Bailey)

Councillor Steven Pritchard, Vice Chair, Corporate Scrutiny Committee attended to present the following motion:

The Committee recommends to Cabinet that the Audit & Governance Committee be requested to look at the the tendering process used by the Council with a particular regard of the scoring mechanism process and that it report back to Cabinet or Corporate Scrutiny on its findings.

(Moved by Councillor J Oates and seconded by Councillor R Pritchard)

113 QUESTION TIME:

QUESTIONS FROM MEMBERS OF THE PUBLIC NO. 1 Under Schedule 4, 13, Mr H Loxton asked the Portfolio Holder Environment & Leisure the following question:-

Mr Loxton was not in attendance and the Chief Executive asked the question on his behalf

"I'm sure councillors would agree with me it's amazing to see so many volunteers picking up litter in our town, and I'm sure they would like to take the opportunity to thank them all.

Can I ask as a result of the amount of litter now being collected by these groups and individuals if the cost of litter removal spent by the council themselves has reduced, and if so how that money saved has been utilised?"

Councillor Pritchard gave the following reply:-

I would like to place on the record the councils thanks to everyone who gives up their time to pick up litter.

As a proud member of Tamworth Volunteer litter pickers, who have collected around 8,000 bags of litter, I would like to praise the ordinary men, women and children from the town who roll up their sleeves to tackle the litter and fly-tipping issue that plagues our society.

The activity of voluntary litter pickers doesn't save the council any money.

Indeed the authority is planning in spending more money on cleaning Tamworth and we are hiring new staff to help clean up our HRA estates.

However the work of voluntary litter pickers does greatly enhance and compliment the authorities' efforts to tackle litter.

Less litter on the streets means that our staff can walk further on their litter picking rounds, they can also cleanse larger areas when supported by community litter pickers.

Voluntary litter picking also means some areas can be visited less frequently by council staff due to community litter picking being so effective, and the council can redeploy litter cleaning staff elsewhere in the Borough.

Finally, volunteers litter picker also clean areas that are outside the councils responsibility, greatly adding to the cleanliness of Tamworth.

We also looking to do some research with members of Tamworth Volunteer Litter Pickers to asses if areas litter picked by volunteers stay cleaner for longer.

I also want to add that Volunteer litter picking provides real encouragement to our street scene operatives, who are so thankful for the communities' efforts.

During the height of the pandemic the street scheme team was stretched to the limit, so without the hundreds of local volunteers it would have struggled to help keep Tamworth clean.

There are several dedicated litter picking groups that operate in and around Tamworth, as well as many other community and voluntary groups, schools, organisations, businesses and clubs that do litter picking.

To every single volunteer litter picker in Tamworth, I say thank you and keep up the amazing work.

114 RELEASE OF CAPITAL CONTINGENCY

Agenda item 10 was discussed before agenda item 6

Report of the Portfolio Holder for Environment, Entertainment and Leisure to request the release of £50k from the Councils Capital Contingency budget to the Capital programme, for the refurbishment of existing play facilities in the Borough

RESOLVED: That Cabinet

approved the release of £50k from Capital Contingency Budget to be included into the 2022/2023 Capital Programme; and

endorsed that the Assistant Director, Operations and Leisure in consultation with the Portfolio Holder for Environment, Entertainment & Leisure be authorised to enter into contract with the most economically viable and environmentally sustainable tender received.

(Moved by Councillor r Pritchard and seconded by Councillor J Oates)

115 CORPORATE VISION, PRIORITIES PLAN, BUDGET & MEDIUM TERM FINANCIAL STRATEGY 2022/23

The Leader of the Council proposed the Vision Statement, Priority Themes, Corporate Priorities and Plans and their inclusion in the Corporate Plan. The recommended to approve the recommended package of budget proposals to enable the Council to agree the:

- General Fund (GF) Revenue Budget and Council Tax for 2022/23;
- Housing Revenue Account (HRA) Budget for 2022/23;
- 5 Year General Fund Capital Programme (2022/27);
- 5 Year HRA Capital Programme (2022/27);
- 3 Year General Fund Medium Term Financial Strategy (MTFS) (2022/25); and
- 5 Year HRA Medium Term Financial Strategy (MTFS) (2022/27).

To comply with the requirement of the Council's Treasury Management Policy in reporting to Council the proposed strategy for the forthcoming year and the Local Government Act 2003 with the reporting of the Prudential Indicators and the requirement to prepare an annual Corporate Capital Strategy.

REOLVED: That Cabinet endorsed the following recommendations to proceed to Council for approval:

1. the Vision Statement, Priority Themes, Corporate Priorities and Outcomes for 2022/23
2. the proposed revisions to Service Revenue Budgets

- (Policy Changes) (Appendix C);
3. the sum of £74,584 be applied from Council Tax Collection Fund surpluses in reducing the Council Tax demand in 2022/23
 4. the sum of £1,200,215 be applied to Business Rates Collection Fund deficits in 2021/22, in part offset by a transfer from the Business Rates reserve of £939,376 (Appendix E);
 5. that on 2nd December 2021, the Cabinet calculated the Council Tax Base 2022/23 for the whole Council area as 22,968 [Item T in the formula in Section 31B(3) of the Local Government Finance Act 1992, as amended (the "Act")];
 6. that the Council Tax requirement for the Council's own purposes for 2022/23 is £4,407,330 (Appendix E);
 7. the following amounts as calculated for the year 2022/23 in accordance with Sections 31 to 36 of the Act:
 - a. £48,399,016 being the aggregate of the amounts which the Council estimates for the items set out in Section 31A(2) of the Act (Outgoings excluding internal GF Recharges);
 - b. £43,991,686 being the aggregate of the amounts which the Council estimates for the items set out in Section 31A(3) of the Act (Income excluding internal GF Recharges);
 - c. £4,407,330 being the amount by which the aggregate at 7(a) above exceeds the aggregate at 7(b) above, calculated by the Council in accordance with Section 31A(4) of the Act as its Council Tax requirement for the year (Item R in the formula in Section 31A(4) of the Act);
 - d. £191.89 being the amount at 7(c) above (Item R), all divided by Item T (at 5 above), calculated by the Council, in accordance with Section 31B(1) of the Act, as the basic amount of its Council Tax for the year;
 8. the Council Tax level for the Borough Council for 2022/23 of £191.89 (an increase of £5 (2.68%) on the 2021/22 level of £186.89) at Band D;
 9. an aggregate Council Tax (comprising the respective demands of the Borough Council, Staffordshire County Council, Office of the Police and Crime Commissioner Staffordshire and Stoke-on-Trent and Staffordshire Fire and Rescue Authority) of £1,922.11 at Band D for 2022/23 be noted (£1,864.86 in 2021/22) (Appendix H);

10. the Council Tax levels at each band for 2022/23 (Appendix H);
11. the sum of £257,591 be transferred from General Fund Revenue Balances in 2022/23 (Appendix E);
12. the Summary General Fund Revenue Budget for 2022/23 (Appendix E);
13. the Provisional General Fund Budgets for 2023/24 to 2024/25, summarised at Appendix G, as the basis for future planning;
14. minimum level for balances of £500k to be held for each of the General Fund, Housing Revenue Account, General Capital Fund and Housing Capital Fund;
15. Cabinet be authorised to release funding from the General Contingency budget and that the release of funding for Specific Contingency items be delegated to the Corporate Management Team in consultation with the Leader of the Council;
16. proposed HRA Expenditure level of £16,640,270 for 2022/23 (Appendix D);
17. rents for Council House Tenants in General Accommodation for 2022/23 be set at an average of £92.87 (2021/22 £89.21), over a 48 week rent year (including a 4.1% increase);
18. rents for Council House Tenants due for 52 weeks in 2022/23 be collected over 48 weeks;
19. the HRA deficit of £1,950,690 be financed through a transfer from Housing Revenue Account Balances in 2022/23 (Appendix D);
20. the proposed 5 year General Fund Capital Programme of £18.837m, as detailed in Appendix I to the report;
21. the proposed 5 year Housing Capital Programme of £46.454m, as detailed in Appendix J to the report;
22. to delegate authority to Cabinet to approve/add new capital schemes to the capital programme where grant funding is received or there is no net additional cost to the Council;
23. the Treasury Management Strategy Statement, the

Treasury Management Policy Statement, Minimum Revenue Provision Strategy and Annual Investment Statement 2022/23 (as detailed at Appendix N);

24. the Prudential and Treasury Indicators and Limits for 2022/23 to 2024/25 contained within Appendix N;
25. adoption of the Treasury Management Practices contained within ANNEX 8;
26. the detailed criteria of the Investment Strategy 2022/23 contained in the Treasury Management Strategy within ANNEX 4; and
27. the Corporate Capital Strategy and associated Action Plan (as detailed at Appendix O).

(Moved by Councillor J Oates and seconded by Councillor R Pritchard)

116 QUARTER THREE 2021/22 PERFORMANCE REPORT

Report of the Leader of the Council to provide the Committee with a performance update and financial health-check. This report was considered by Corporate Scrutiny Committee on 1st February 2022.

RESOLVED That Cabinet

approved that the General Fund budgets are revised to reflect the forecast savings and associated projected net underspend at Quarter 3 of £895k.

(Moved by Councillor J Oates and seconded by Councillor R Pritchard)

117 ESTABLISHMENT OF A STAFFORDSHIRE LEADERS BOARD

Report of the Leader of the Council to enable Cabinet to consider joining the proposed Staffordshire Leaders Board. The Council along with County Council and the other 7 District and Borough Councils have been meeting to formalise a new Leaders Board to facilitate closer and stronger two tier working and to position this group to enter into discussion with Government for a formal "County Deal".

RESOLVED That Cabinet

1. Agreed to participation in the Staffordshire Leaders Board

based on the terms of reference/Constitution attached to this report

2. Agreed to appoint the Leader of the Council as the Councils representative on this board, with the Deputy Leader as the substitute member.

(Moved by Councillor J Oates and seconded by Councillor R Pritchard)

118 WRITE OFFS

Report of the Portfolio Holder for Finance, Risk and Customer Services to ask that Members endorse the amount of debt written off for the period 1st April 2021 to 31st December 2021.

RESOLVED: That Cabinet

endorsed the amount of debt written off for the period of 1st April 2021 to 31st December 2021 – as shown in Appendix A-E.

(Moved by Councillor M Bailey and seconded by Councillor R Pritchard)

119 EXCLUSION OF THE PRESS AND PUBLIC

RESOLVED: That members of the press and public be now excluded from the meeting during consideration of the following item on the grounds that the business involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972 (as amended).

(Moved by Councillor J Oates and seconded by Councillor R Pritchard)

120 DELIVERY OF DISABLED FACILITIES GRANTS

Resolved: that the recommendations in the report be approved

(Moved by Councillor A Farrell and seconded by Councillor R Pritchard)

121 SUMMER 2022 ACTIVITY PROGRAMME

Resolved that the recommendations in the report be approved

(Moved by Councillor R Pritchard and seconded by Councillor J Oates)

Leader

DRAFT

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17th March 2022**Report of the Chair of the Infrastructure Safety & Growth Scrutiny Committee****Matters referred to Cabinet in accordance with the Overview and Scrutiny Procedure Rules****Exempt Information**

None

Executive Summary

The following Committee has referred the following matter to Cabinet:

Scrutiny Committee	Title of Matter referred	Date of Scrutiny meeting
Infrastructure Safety & Growth Scrutiny Committee	Economic Development Service Workplan	16 th February 2022

Purpose

To update Cabinet and to make recommendations to it following consideration of matters by the Infrastructure Safety & Growth Scrutiny Committee.

At its meeting on 16th February 2022, the Committee received a report on the Economic Development Services Workplan, prior the item's consideration by Cabinet at Cabinet meeting on 17th March. Details of the Report can be found on the website [here](#).

The Committee considered the recommendations in that report which were for the Committee to note and following discussion the Committee agreed to amend one recommendation and move a further recommendation and accordingly the four recommendations of the Infrastructure Safety & Growth Scrutiny Committee set out below are recommended to Cabinet.

Recommendations

The Committee recommends to Cabinet that:

1. A financial contribution be made to support Staffordshire Destination Management Partnership (DMP) for financial year 2022/2023 with delegated authority given to the Assistant Director Growth and Regeneration in consultation with the relevant Portfolio holder(s) to make a decision on extending the contribution into financial years 2023/2025.
2. The package of economic measures detailed in the report focusing on Town Centre businesses and the wider tourism based economy be agreed.
3. The change of focus was noted from the current Start-Up Business grant to the Town Centre Business Grant.
4. Organisations which remained at this time subject to investigation by HMRC in respect of any applications for COVID related claims would be ineligible for Town Centre Business Grants.

Options Considered

None.

Report Author

Councillor Simon Goodall
Chair of Infrastructure Safety & Growth Scrutiny Committee

Thursday, 17 March 2022

Report of the Leader of the Council

New Vision and Corporate Plan 2022-2025

Exempt Information

None

Purpose

To provide Cabinet Members with an update of the Council's new vision and Corporate Plan for the period to 2022-2025.

Recommendations

It is recommended that Cabinet approves the new vision and Corporate Plan.

Executive Summary

Last month the Council approved the Medium Term Financial Strategy (MTFS) for the period 2022-25. The focus of that document was upon how the Council will use MTFS to deliver its new focused vision

'Tamworth – celebrating our heritage, creating a better future'

In order to achieve the new vision a new Corporate Plan has been developed (*Appendix 1 refers*).

A successful Corporate Plan provides the organisation with a clear direction, a guide for decision making in terms of which activities to pursue and, as such the plan includes:

- an 'Annual Review' element
- a summary statement from each Cabinet Holder with a portfolio for specific services which reflects upon some of the key achievements in their respective portfolios
- details of the five priority areas together with clear commitments
- details of corporate change and transformational projects intended to shape the longer term future for the Tamworth the place, its communities and economy
- details of short to medium term projects that support the delivery of the new vision

The Corporate Plan will, subject to Members' approval, be posted on the Council's internet site for access on demand.

To further support the delivery of the new vision and priorities, it is planned to review and redesign the **State of Tamworth Debate** process which would normally take place in March. The aim of the review is to ensure that this newly developed vision and Corporate Plan remains widely consulted, current and relevant to Tamworth. Further details will be presented to Cabinet for consideration in due course.

Options Considered

Not applicable.

Resource Implications

There are none directly arising from this report.

Legal/Risk Implications Background

There are none directly arising from this report.

Equalities Implications

All strategies, policies and procedures arising from the Corporate Plan will be equality impact assessed.

Environment and Sustainability Implications (including climate change)

The new Corporate Plan contains a corporate project in term of embedding net zero carbon which will detail TBC's road map to meet the Council's target of becoming net zero carbon by 2050 with an aspiration to achieve 2030 should the council be financially able to do so. This commitment was approved by Council on the 19th November 2019.

Background Information

The Council has complied with recognised best practise and produced a Corporate Plan annually since 2008. This year a new vision, priorities and subsequently a new Corporate Plan has been developed to support the delivery of the vision.

Good scrutiny, monitoring and governance will continue to ensure that activities across the lifespan of the plan are aligned to the priorities as set out in the plan

It is both prudent and good practise to provide our stakeholders with the assurance they need that Tamworth Borough Council has a vision and clearly defined priorities that are supported by ambitious plans and actions.

Report Author

Anica Goodwin – Executive Director Organisation

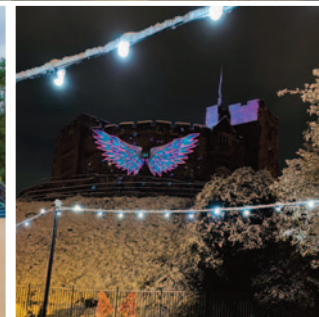
List of Background Papers

Report to Council 22 February 2022 – Corporate Vision, Priorities Plan, Budget and Medium Term Financial Strategy 2022/23.

Appendix

1 – Corporate Plan 2022-2025

TAMWORTH BOROUGH COUNCIL CORPORATE PLAN 2022-2025



OUR VISION: Tamworth – celebrating our heritage, creating a better future

CORPORATE PLAN 2022-2025

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WELCOME

Welcome to Tamworth Borough Council's new Corporate Plan and vision for the years 2022-2025. The document outlines what we want to achieve for the next three years and our progress against the 2019-2022 Corporate Plan. It also contains updates on our Recovery and Reset programme, which was established as a response to the impact of the Coronavirus pandemic on Council services and major high street regeneration programmes.

INTRODUCTION

Set in the beautiful county of Staffordshire, Tamworth is a vibrant town with a rich heritage.

Located in the centre of Britain, with a growing population of over 77,000 people, Tamworth is a borough with much to be proud of. Our transport links, unique shopping experience, developing town centre, green spaces, leisure offer, including our cultural and wide ranging outdoor events programme, as well as our historic buildings, all help make it a great place to live, work and visit.

In addition to all that Tamworth already has to offer, exciting times are ahead as we are about to embark on a period of significant transformation. Multi-million pound projects, such as the Future High Streets development, will help to bring about lasting change and improvements for the future.

This will assist with our mission to restore Tamworth town centre as the beating heart of the community, a place that people want to visit, rather than a place they have to visit.

Although it has not been possible as a council to undertake the usual levels of face-to-face engagement during this past year, we have continued to listen to our residents and partners. This has included carrying out a brand new Residents Survey to find out what matters most to people. The valuable information gained from the 'Talk To Us Tamworth' survey, together with the Budget Consultation and previous 'Tamworth What's Next' workshops, has been used to shape this new Corporate Plan and ensure it addresses those important issues.

We know, for example, that people value now more than ever having access to parks and outdoor spaces and that they are concerned about the economy and particularly their own financial security. With the backdrop of Covid and the announcements of ever-changing variants, the Council will continue to deliver what is important to its residents, businesses, communities and those most vulnerable in Tamworth.

Looking back

Over the past 18 months, individuals and organisations across the borough have had to adapt to new ways of living and working. As a Council we too have had to adapt in the way we deliver our services in response to the crisis and we will apply our learning to shaping our approaches for the future.

Working with a wide range of partners, and with an outstanding community response, we have continued to develop so that we can provide the best possible services, with the main aim of ensuring people have opportunities to live healthy and fulfilling lives in safe, thriving families and communities.



A handwritten signature in black ink, appearing to read 'AB' followed by a long horizontal stroke.

Andrew Barratt
Chief Executive



A handwritten signature in black ink, appearing to read 'J Oates'.

Jeremy Oates
Leader of the Council

We know the challenges of the last 18 months will have a lasting impact on us all, but particularly on the wellbeing of children and young people and their education. With this in mind, we will continue to work closely with our partners and stakeholders to ensure this is prioritised. Where the Council does not have direct responsibilities, such as skills and education, in these areas we will use our influence with the relevant public bodies.

We also recognise the impact of the virus on elderly and vulnerable residents and will continue to work with our partners to help keep people safe with access to the services that are most critical to their needs.

Whilst the long-term impacts of the crisis provide an additional reason for people to avoid urban/town centres for a sustained period, we are already seeing the economic impact with reduction in footfall in the town centre, reduced use of car parks and fewer people visiting hospitality venues including Tamworth Assembly Rooms and Tamworth Castle.

Looking forward

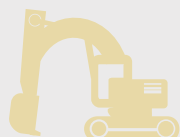
That being said, we have plenty to be optimistic about, with lots of exciting projects and continuing partnership work on the agenda for the next 12 months and beyond.

This work has all been brought together by councillors, during a number of councillor-led workshops and seminars, into a new refocused vision to reflect new priorities. This year more collaborative budget setting workshops were held to ensure all councillors were able to have involvement in what is important to them and their residents.

Our new vision is **'Tamworth - celebrating our heritage, creating a better future'**

In order to achieve that vision, we have developed this new Corporate Plan which will be delivered with a workforce and organisation that has adapted to an unprecedented national challenge, working hand in hand with our partners and communities.

This new vision, together with our new Corporate Plan, details five areas of focus for the borough; including the key outcomes we are seeking to achieve and how we will work to achieve them.



CORPORATE PLAN SUMMARY

TAMWORTH BOROUGH COUNCIL VISION

'Tamworth – celebrating our heritage, creating a better future'

1. THE ENVIRONMENT

- ▶ Enforcement and education with regard to litter and fly-tipping
- ▶ Development of infrastructure for acting on Climate Change
- ▶ Support more people to recycle and to reduce waste
- ▶ Working with partners to protect, maintain and improve the green space offer

3. INFRASTRUCTURE

- ▶ Review Local Plan to improve the transport links within Tamworth
- ▶ Improve existing walkways and cycling routes
- ▶ Ensure more people can access council services digitally/digital enhancement with partners and within Council housing stock

2. THE ECONOMY

- ▶ Development of business initiatives to promote start up and growth
- ▶ Support business growth to generate employment opportunities by working with businesses
- ▶ Provision of good quality and affordable housing
- ▶ Improve tourism in terms of good access to information for visitors to help local businesses and Tamworth as a destination as a whole, maximise and improve the quality of the visitor experience

4. LIVING IN TAMWORTH

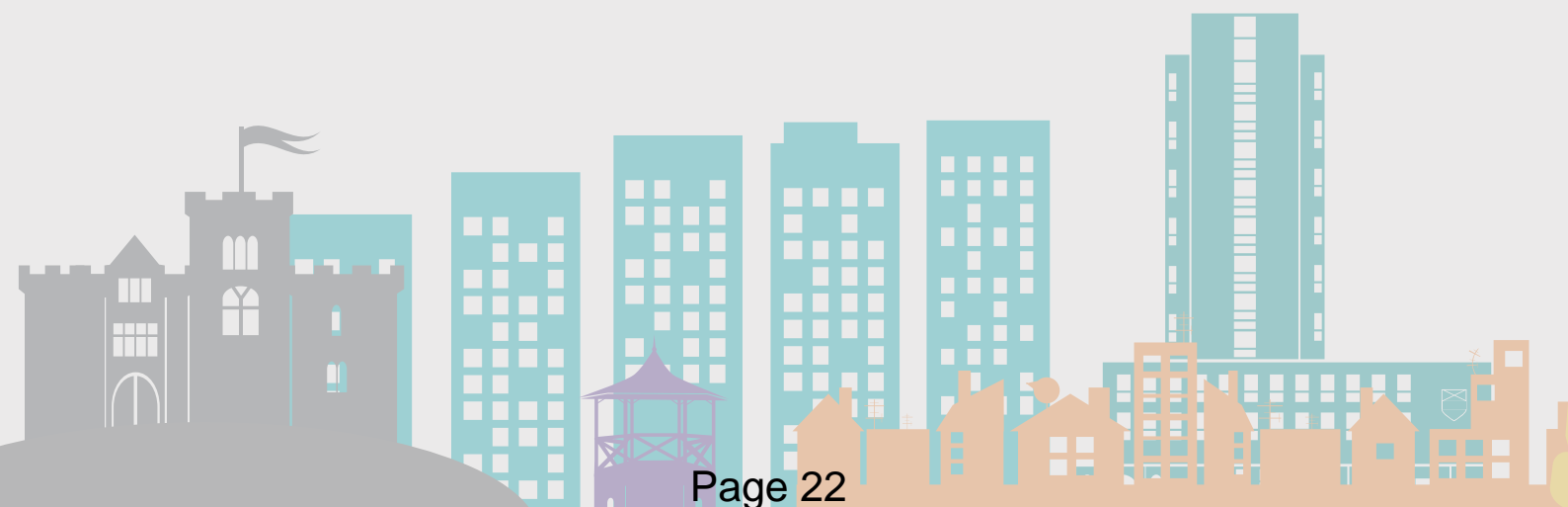
- ▶ Ensure adequate supply of affordable housing through the Local Plan review
- ▶ Investment in Neighbourhood and Place environment
- ▶ Through our Economic Development team, we will support job creation and business retention and expansion through interventions and advice, and seek to protect the local economy where we can influence this.
- ▶ Improve and promote Tamworth's historic and cultural assets and events
- ▶ Community Safety focus on neighbourhoods and place
- ▶ Working with partners to ensure the fear of crime within Tamworth is reduced

5. TOWN CENTRE

- | | |
|---|---|
| <ul style="list-style-type: none"> ▶ Continue to develop street market and extend supporting events around the market to add vibrancy within the town centre ▶ Create a branding scheme for "Created in Tamworth" ▶ Provide the infrastructure to improve evening and night time economy ▶ Embrace Tamworth's history and culture so as to build a sense of local pride and support our children's education and understanding of the significant part Tamworth played in British history | <ul style="list-style-type: none"> ▶ Continue to promote all outdoor events ▶ Development of a new Tamworth Enterprise Centre as part of the structural transformation of the town centre ▶ Make the town centre more accessible ▶ Provide the environment where the leisure and food offer can grow and flourish ▶ Working with others seek to improve the night-time transport offer to support the overall night-time economy |
|---|---|

Our Corporate Plan involves transformational projects intended to shape the long term future for Tamworth the place, its communities and economy. Included are comprehensive plans for the regeneration of the town and fundamental changes to the way the council operates:

SHORT TO MEDIUM TERM PROJECTS	TRANSFORMATIONAL AND CHANGE LONGER TERM PROJECTS
▶ Development of an Organisational Development Strategy	▶ Future High Street Funds
▶ Town Centre Masterplan	▶ Gungate Development
▶ Place Investment Strategy	▶ Medium Term Financial Strategy and delivery plan
▶ Corporation Street Gateway Project	▶ Recovery and Reset Programme
▶ Undertake a self-assessment of our role as a social housing landlord against national regulatory standards.	▶ Completion of the Local Government Boundary Review
▶ Garage Site Development	▶ Net Zero Carbon Implementation Plan
▶ Asset Management Strategy	
▶ Town Hall Development	
▶ ICT Strategy Implementation Plan	
▶ Development of Tourism Strategy	



LONGER-TERM TRANSFORMATIONAL PROJECTS

Future High Street Fund which consists of an incredible £21.65m being awarded to transform the town centre into the busy, thriving heart of the community. When combined with funding from external partners and Tamworth Borough Council, the projects represents a combined investment in the town of around £40million.

There are five core elements of the project:

- ▶ **College Quarter:** The relocation of Tamworth College, part of South Staffordshire College, to a new building on the site of the Tamworth Co-operative Society department store
- ▶ **Enterprise Hub:** Refurbishment of the locally-listed part of the Tamworth Co-operative Society department store (the Colehill frontages) into a new enterprise centre for small businesses
- ▶ **Middle Entry Refurbishment:** Refurbishment and improvements to Middle Entry including a new semi-permanent structure for start-ups and niche businesses
- ▶ **Castle Gateway:** An improved entrance between the town centre and the Castle Grounds by enhancing the Castle Gatehouse area and adjoining Market Street properties
- ▶ **St Editha's Square:** The transformation of St Editha's Square into a multi-purpose outdoor space for entertaining and events

The **Gungate Development** is a project that will regenerate a multi-million pound vacant edge of town centre site, in the ownership of the Council and external stakeholders. Development of the land north and south of Spinning School Lane into a mixed use site including residential, which will support the town centre by delivering uses that complement the existing offer and increase footfall, choice and prosperity.

- ▶ **Finance and Commerciality** work will continue including the delivery of our Medium Term Financial plan as well as seeking to remove historic underspends and adopt an in-service approach to rigorous and controlled spending.
- ▶ **Reset & Recovery Programme** will include:
 - ▶ Smart Working – Exploration of the business impacts around current levels of home working and what the future is for agile working.
 - ▶ Marmion House, future building requirements and utilisation - Consideration of the best use of all our property assets to ensure the Council's resources are focused on front line service delivery.
 - ▶ Front Reception and Customer Service Offer – Exploration of customer service models to assess the impact of front reception closing during the pandemic and how acceleration of digitising services can be delivered, whilst ensuring our most vulnerable customers retain face to face services where appropriate
 - ▶ Service Re-design – A review to identify short, medium, and longer-term opportunities to improve delivery of services central to the Council's core purpose and strategic aims
 - ▶ Third Sector Support and Vulnerability Strategy – Recognising that one of the most positive outcomes to the pandemic is the overwhelming ability of 'anchor organisations and communities' to mobilise and support each other, this project will explore how the Council's commissioning framework can be aligned to build on these foundations going forward and how we define and develop our vulnerability strategy, building on the baseline assessment.



PORTFOLIO HOLDER STATEMENTS

PORTFOLIO: ENVIRONMENT, ENTERTAINMENT AND LEISURE

CLLR ROBERT PRITCHARD DEPUTY LEADER OF THE COUNCIL



As we emerge from the pandemic we have the opportunity to enjoy more of the best that Tamworth has to offer. The council will deliver a plan to ensure residents can do just that.

The council is investing in play, culture and open spaces - it is boosting our culture and supporting our whole town.

We have rebuilt the town's Castle Grounds play area into a flagship facility that is the envy of our neighbours; we will now embark on a plan to invest in our smaller neighbourhood play areas, ensuring that the whole borough has access to quality play.

We will provide a jam-packed schedule of events at our Assembly Rooms; fun and exciting outdoor events in our Castle Grounds and a Castle filled with historic eccentricity. We will do everything we can to ensure that Tamworth is always a first choice for a day out.

We are also investing in our neighbourhoods. The Street Scene team have again proven to be an invaluable and proactive force. They deliver the day-to-day functions necessary to keep our town looking clean and tidy, and this is recognised in the number of positive comments received about their work.

They must be commended for maintaining their high standards during the Covid-19 pandemic. They are also responsible for maintaining our open spaces, ensuring that they are safe, attractive and fit for purpose during these difficult times.

We have also reformed how we manage our council estates and, over the next few years, residents will see a huge increase in the quality and standard of these areas. We will have a laser-like focus on ensuring that we have a clean town, a tidy town. We will also return to a year of full floral display, ensuring that the town sees a spring and summer full of colour.

The council will continue to work with the army of litter pickers across the town, ensuring that we support them in their fantastic work helping to rid the town of litter. Through the Covid crisis, an army of residents came out to litter pick in support of the council's team, and to those kind-hearted residents we say thank you.

The council will also work to tackle the source of litter and fly-tipping. We will be deploying new CCTV technology to catch litter louts in the worst hotspots. Fly-tipping continues to be a scourge on our open spaces and we will work with our neighbouring authorities to catch and punish these waste criminals. Finally we will be empowering councillors with ward-based budgets, so they can direct spend at a local level, ensuring that the local needs of residents can be better met by the council.

CLLR MARIE BAILEY



Finance

The council has continued to support our most vulnerable people with a scaled-up response to Covid-19 during the year, including the payment of Council Tax hardship funding to individuals and payments under the self-isolation test and trace scheme. Since the beginning of the pandemic in March 2020, over £23million in Government grants has also been distributed to local businesses, as well as expanded Businesses Rates Relief totalling over £20million to retail, hospitality and leisure businesses, with a further 50% relief to be factored in for 2022/23 ahead of the new financial year.

Our finance team's continued strong governance arrangements, including the setting of a balanced Medium Term Financial Strategy in February 2020 and again in February 2021, ensures that we are still able to deliver our frontline services.

We have completed the 2019/20 and 2020/21 accounts with our external auditor confirming that we continue to meet all statutory deadlines.

The council's Revenues Team has once again performed to very high standards, ensuring our debt exposure is kept to a minimum.

Progress is going well with our comprehensive asset management plan for both the housing revenue account and general fund assets.

IT & Customer Service

As we continue along on our transformational path, we have implemented the council's first ICT strategy which will ensure that we have the framework in place to support the council.

We have successfully delivered phase one of 'MyTamworth' customer portal, which includes self-service for reporting an issue, viewing of a council tax account and filing a complaint.

Our customer contact team have, over the last 12 months, dealt with over 45,000 queries ranging from benefits to housing and we continue to strive to have all queries resolved during that first contact. I am pleased to report that our satisfaction feedback is 100%.

To assist the residents of Tamworth on their own digital journey, our customer service staff attended St Editha's church Senior's Fayre, followed by some basic IT sessions for senior residents to enhance their knowledge and access to digital communications.

We continue to invest in our elected members and employees, ensuring they have all the training and development they need to carry out their role.

Finally, the council will continue to ensure it is open and accountable to the public; this will be achieved through a review of the council constitution and ensuring good governance across the authority.

PORTFOLIO: VOLUNTARY SECTOR, TOWN CENTRE, EVENING ECONOMY & COMMUNITY SAFETY

CLLR MARTIN SUMMERS



I am very excited to step up to Cabinet this year, and have the opportunity to take on such a diverse and interesting portfolio. We are incredibly lucky to have a vibrant and effective third sector in Tamworth that we should treasure and look to strengthen our working relationship with.

I am pleased to say as a Council we are soon to ratify the Voluntary, Community and Social Enterprise sector pledge, and I look forward to us working together with those common aims for the good of Tamworth and its people.

Tamworth has such a potential to thrive, our town centre has changed so much over several decades which I have seen first-hand throughout my life here. We are still very much in the midst of those changes, in the face of a wholesale switch away from retail forming the basis of its offering.

Our town centre will soon, in only a few short years, benefit from massive investment courtesy of the Future High Streets Fund which seeks to shape the realistic and sustainable use of an important centre of our community.

I strongly feel that whilst our town centre is very different to how it once was, it is starting to provide what we now demand and need in terms of leisure and recreation. Our night-time offering is becoming ever more vibrant and thriving. We as a Council must do what we can to support that new demand and ensure that everyone can access and use local businesses whilst feeling safe in doing so.

Working and building relationships with our partners, Tamworth is becoming a safer family-friendly environment for our residents and visitors. Within my role I will endeavour to help build those relationships along with our officers who have already made great strides in doing so. After everything we as a town and country have gone through in the last few years, we deserve a positive future.

PORTFOLIO: HOMELESSNESS PREVENTION & SOCIAL HOUSING

CLLR ALEX FARRELL

I was very pleased to take on the portfolio for homelessness prevention and social housing, and I'm constantly in awe of our fantastic officers and how well they've coped during such a challenging couple of years.

It's been a busy year for the team, but here are just a few of the highlights: Our new Allocations Policy included the biggest change to the council's housing register since it first implemented choice-based lettings, and these changes reduced the register substantially from 1333 in May 2020 to 665 after its implementation.

I was pleased to oversee the council's 11th Annual Report for council tenants and I updated Cabinet on existing plans to undertake an independent review of the council's compliance with the regulatory standards and the social housing white paper, across the range of responsible corporate teams.

We refreshed and updated the Council Housing Repairs Policy and Voids Standards. It sets out proposals for further consultation with residents with a view to then formally adopting the updated policy. We also set out proposals for the potential move from a standard Schedule of Rates type contract to a Price Per Property style contract in respect of the response repairs elements. There is a planned consultation on the Tenancy Management Policy for council housing, specifically to deal with fixed term tenancies, following fundamental changes to case law.

I was so pleased to see the Tinkers Green & Kerria Regeneration project nominated for an award for social housing regeneration, and I attended the ceremony in Birmingham with the Leader of the Council and proudly talked up Tamworth.

We've had continued success with Homelessness Prevention. Our Rough Sleeper Count reported back to Homeless Link 2021 was one, a fall of four from the previous year of five - so that was a pleasing and significant reduction in rough sleepers in Tamworth. We were very happy to receive Rough Sleeping Initiative (RSI 4) funding from the Department for Levelling Up, Housing and Communities to the sum of £100,000 for homelessness prevention activities and to update and set out amendments to the council's Allocations Policy as the Government has refreshed the guidance.

We also renewed our Winter Relief project, working collaboratively with the Heart of Tamworth once again, and I took part in a successful Health and Wellbeing Scrutiny project which highlighted the important work done in Tamworth to tackle homelessness of all forms.

We have continued to deliver disabled adaptations to tenants and the wider community through the grants process and completed detailed fire safety inspections of the high-rise blocks, as well as maintaining high levels of compliance in relation to gas servicing and electrical inspections.

During the pandemic we have delivered a programme of communication and engagement with all Tamworth residents as per National COVID-19 Shielding List distributed by Staffordshire County Council - including calls/sign posting/registering/referring/updating spreadsheet/welfare calls - facilitated by teams across the council. This was particularly important in our sheltered housing schemes and high rise flats, providing weekly communications with vulnerable residents who needed our support.

To date, I have chaired two informal Housing Sub-Committees where we have debated policy and had a chance to talk about the big issues facing Tamworth's social housing and homelessness prevention. This is a fantastic initiative and one we look to continue in the future.



CLLR STEPHEN DOYLE



Regulatory

With the pandemic still evident, the Environmental Health Team continue to face a high workload that continues to stretch them as individuals and a team. As well as working with local businesses to help them try to return to operation amid the changing restrictions for different business sectors, the team has also continued to support Staffordshire County Council to develop Standard Operating Procedures across Staffordshire.

Such successful joint working has led to a seamless approach across organisations responsible, in different ways, in identifying Covid outbreaks/hotspots and managing compliance. As such Staffordshire very quickly emerged as a county capable of rapid mobilisation to address such a difficult public health threat. The team has also worked, often at short notice, to identify locations for mobile testing units and vaccination centres to address the demand that has arisen.

In addition, the department has continued to provide critical services including high-risk Food Hygiene inspections/complaints, Taxi and Alcohol Licence applications, noise/odour complaints and planning consultations.

The Planning Team continues to move forward with the Local Plan Review, taking into consideration any changes to planning policy issued by Central Government.

The team has also determined 462 applications during 2021, which is 50 more than the 12 months before. The types of applications have varied significantly in scale and complexity, from householder developments to new employment sites such as the redevelopment of the former Co-op supermarket site.

In addition the team dealt with 30 formal pre-application enquiries and over 300 general enquiries, as well as 52 enforcement cases which led to three enforcement notices being served.

Work continues on legislative requirements that place a duty to cooperate with neighbouring and other authorities that have strategic and/or cross border matters in common like those of our near neighbours Lichfield and North Warwickshire District Councils and those further afield within the Housing Market Area and Birmingham City Council.

The team has also published an Infrastructure Funding Statement, that transparently sets out the Section 106, and CIL spending to ensure that legislation is complied with.

The Development Control team continue to be top performers and with the planning team having engaged with neighbouring authorities to ensure that applications on the border of Tamworth contribute to necessary infrastructure to meet the needs of those new residents.

The Building Control and Land Charges Partnership continues to perform well, sharing the considerable knowledge and experience of six local authorities.

The team is ISO 9001 certified and offers advice and guidance to make sure projects meet the building standards. They also aim to save time and money through a fast, efficient, responsive, and professional service.

Community Safety

There have been several policy updates over the last year for Community Safety, refining the council's approach and commitments.

- ▶ Update of Environmental Crime Policy
- ▶ Modern Slavery and Human Trafficking Statement 2019/20
- ▶ Tamworth Community Safety Partnership Plan 2020-2023 (2021 Update)
- ▶ Corporate Enforcement Policy

The service continues to provide a high level of confidence amongst the residents in the community, focusing on those who are most vulnerable. Continuing to support environment where our partners can share information on cases and improve focus on resources in resolving issues.

The Community Safety Plan 2020-23 has been updated and continues to provide an action plan to work together. Providing a three-year rolling plan which outlines how partners are going to collectively tackle community safety issues in the Tamworth borough.

Community Wardens

The Community Wardens continue to engage with residents and our partners through events such as the ASB Awareness Week and Operation Mischief, carrying out late joint patrols with police officers also engaged in the Rough Sleeper annual count, checking on homeless people borough-wide.

CCTV

The project to update the town's CCTV has been a success with mobilisation of all 104 cameras switched over from Tamworth to WMCA, providing a seamless transition to the new CCTV monitoring platform. The new system now consists of digitally HD cameras, providing much needed monitoring clarity.

There is also the development of detailed quarterly reports, a mechanism for recording data and intelligence to help identify hot spots of activity, also trends.

There has also been mobilisation of MRS Radio, working with MRS, WMCA & TIS engineers as well as installation and implementation of Police Client View for the local police so they can access footage as required.

THE MEDIUM TERM FINANCIAL STRATEGY

STEFAN GARNER, EXECUTIVE DIRECTOR FINANCE



The Medium Term Financial Planning process is being challenged by the ongoing uncertain economic conditions. The attached forecast is based on a 5 year period, but does contain a number of uncertainties.

For two years, the Government has only held single-year Spending Reviews, with 2019 being a single year due to the political turbulence around Brexit, and 2020 being a single year, given the COVID-19 pandemic. However, on 7th September 2021, the Chancellor wrote to Secretaries of State to confirm the Government's intention to complete a multi-year Spending Review (SR2021), setting revenue and capital budgets for 2022/23 to 2024/25.

As part of the recent Spending Review, no announcement was made about the Government's plans for funding reform or a reset of the Business Rates Retention (BRR) system, both of which were originally expected to be implemented in 2019/20, but which have been delayed a number of times.

The 2022/23 Local Government Finance Settlement has now been published, for one year only and is based on the Spending Review 2021 (SR21) funding levels. This is the first time since 2015 that, in the context of a multi-year Spending Review, the Government has only provided local authorities with a single-year settlement.

No detailed announcements were made on funding reform, though Government confirmed that it is committed to ensuring that funding allocations for councils are based on an up-to-date assessment of their needs and resources.

While this means the Council will be able to retain its business rate growth for 2022/23, it also means that the uncertainty continues and potentially the Council still faces losing this growth from 2023/24 as, over the coming months, the Government have stated that they will work with the sector before consulting on funding reform.

There is a high risk that these reforms will have a significant effect on the Council's funding level from 2023/24.

Financial resilience is and has been the key requirement for local authorities at any time, but in the current crisis it has assumed unprecedented importance. Cabinet on 22nd October 2020 approved the Recovery and Reset programme which aims to consider how we can tackle the financial challenges facing the council as a result of the coronavirus pandemic. This will include reviewing services, reducing waste demand on services (basically this is any action or step in a process that does not add value to the customer), exploring opportunities for income generation and identifying any further savings.

The Council remains committed to promoting and stimulating economic growth and regeneration; meeting our housing needs; creating a vibrant town centre economy and protecting those most vulnerable in our communities. The Council is responding to these challenges by considering the opportunities to grow our income. We are ambitious with our commercial view and will continue to work hard to identify income streams that enable us to continue to meet the needs of our residents.

More than ever, we recognise that our financial capacity will be less than in previous years which means that we will need to maintain our approach to innovation, collaboration and transformation.

This approach will change the organisation and how it works; will require Members to put evidence and insight at the heart of our decision making to ensure that we are transparent about the rationale for our decisions and plans; will involve managed risks and will sustain essential services critical in supporting the most vulnerable in our communities at a time when demand is increasing and resources reducing.

On 22nd February 2022, Council approved a 3 year Medium Term Financial Strategy for the General Fund with a Council Tax increase of £5 for the year – in order to continue to deliver those services essential to the local community.

With regard to the Housing Revenue Account, a 5 year MTF5 was approved by Council including significant investment in regeneration projects to meet future housing needs and sustain the HRA in the longer term.

The headline figures for 2022/23 are:

- ▶ a General Fund Net Cost of Services of **£6,580,410**
- ▶ the Band D Council Tax would be set at **£191.89** an increase of **£5** (2.68% - c.£0.10 per week) on the level from 2021/22 of **£186.89**;
- ▶ a General Fund Capital Programme of **£18.837m** for 5 years;
- ▶ a Housing Revenue Account (HRA) Expenditure level of **£16,640,27** for 2022/23 (excluding interest & similar charges);
- ▶ an average rent of **£92.87** set in line with the approved Rent Setting Policy including a 4.1% increase in average rent (on the 2021/2022 average rent of £89.21 based on a 48 week rent year) in line with Government confirmation that social housing rents can increase to include 'up to' a factor of the consumer price index (CPI) measure of inflation plus 1% for five years from 2020, following the conclusion of a consultation of the new rent standard, and equates to £85.73 on an annualised 52 week basis;
- ▶ a Housing Capital Programme of **£46.454m** for 5 years.



WHAT WE ACHIEVED IN 2021/22

ECONOMY AND REGENERATION



- ▶ Successful bid for £21.65m from the Future High Streets Fund programme, and project inception.
- ▶ New market operator contract awarded including successful delivery of a large food festival at the end of October.
- ▶ Business case, procurement and operational delivery of new car parking machines to maximise opportunities for income and consistency of data.
- ▶ Delivery of a Skills Officer on behalf of GBSLEP focusing on supporting the Employment and Skills Board across Southern Staffordshire.
- ▶ Design and delivery of business support programmes to support food and hospitality businesses particularly in the town centre.
- ▶ Delivery of Government funded support schemes in particular Welcome Back fund and Reopening High Streets Safely totalling £135,000.
- ▶ Completion of feasibility and viability studies for Reset and Recovery programme focusing on Marmion House regeneration.
- ▶ Heads of Terms agreed with Homes England to support collaborative work on Gungate site, including allocation of funding and resource.
- ▶ Procured, approved and entered into a contract with an electric vehicle charging point supplier for 4 fast chargers on designated council car parks.
- ▶ Two successful applications to the Cultural Recovery Fund. Projects included turning the gatehouse into Castle-run kiosk and café; implementing a new augmented trail at the castle, digitising the castle collection and archive, installing new interpretation panels around the town, adjusting and updating wayfinding across the town centre.

PLANNING



- ▶ The number of planning applications received reached over 480, which is higher than four of the last five years.
- ▶ The team has also determined 462 applications during 2021 which is 50 more than the 12 months before.
- ▶ Dealt with 30 formal pre-application enquiries and over 300 general enquiries, as well as 52 enforcement cases which led to three enforcement notices being served.
- ▶ Work has also begun on the development of a new local plan for Tamworth
- ▶ Collected over £3million that will contribute towards the development of infrastructure within the borough in the coming years.

WHAT WE ACHIEVED IN 2021/22 cont.

OUTDOOR SPACE, ARTS & EVENTS (INCL ASSEMBLY ROOMS)



- ▶ The Council reopened Tamworth Assembly Rooms in September 2021 following its closure due to the Covid pandemic. The theatre has hosted many sell out shows and Christmas party events, with a full catering offer for the first time ever and selling over 10,000 tickets by December 2021.
- ▶ Recovery funding enabled the purchase of a cinema screen which has added a further dimension to the theatre.
- ▶ New enhanced weddings package developed at Tamworth Castle and Tamworth Assembly Rooms.
- ▶ New outdoor events, outdoor cinema, theatre and Roller Rink have proved very successful. Fireworks night and the Christmas lights switch on returned this year with record numbers of attendees.
- ▶ New outdoor table tennis tables and gym in the Castle Grounds have opened providing more outdoor leisure facilities.
- ▶ Additional picnic benches have been placed in Castle Grounds and Dosthill Park.
- ▶ The Castle Grounds play area underwent a £375k refurbishment, opening in September and a new play area was installed within the new development at Tinkers Green.

TAMWORTH CASTLE



- ▶ In May 2021 Tamworth Castle reopened following closure due to covid19 and recorded 12,856 visitors by October 2021.
- ▶ In May 2021 the new Castle lighting scheme was implemented enabling the castle to be floodlit with different colours to mark special occasions within the town and to join in with national celebrations.
- ▶ Battle and Tribute gallery was opened in May 2021.
- ▶ Tamworth Castle launched a new collections website.
- ▶ Tamworth Castle increased its Visit England VAQAS rating in summer 2021 and in October was awarded the 'Best Told Story' accolade for interpretation, staff and volunteer guides.
- ▶ Over 3,000 learners visited in the autumn term.
- ▶ Over 500 people of all ages contributed to a community art project to create a 'shield wall' of decorated shields.
- ▶ In September, around 6,000 people attended a Saxon Encampment weekend in the castle and the grounds.
- ▶ The new Christmas event sold out and attracted over 1,000 visitors to the castle over two weekends during December 2021.
- ▶ The Gibbs and Canning 'griffin' in the museum collection was conserved and installed at Tamworth Castle thanks to funding from Tamworth Borough Council and Friends of Tamworth Castle. It is exhibited alongside two other items from the social history collection.

FINANCE



- ▶ Over £23million in Government grants has been distributed by the Council to local businesses since the start of the Coronavirus pandemic in March 2020, and expanded Business Rates Relief totalling over £20million to retail, hospitality and leisure businesses, with a further 50% relief to be factored in for 2022/23 ahead of the new financial year.
- ▶ Continued support for vulnerable people and a scaled-up response to COVID-19 during the year including the payment of Council Tax hardship funding to individuals and through payments to over 1,240 people under the self-isolation test and trace scheme.
- ▶ Continued strong Governance arrangements including the setting of a balanced Medium Term Financial Strategy in February 2020 and again in February 2021 and completion of the 2019/20 and 2020/21 accounts following sign off by the external auditors in line within statutory deadlines.

COMMUNICATIONS



- ▶ Widespread 'Shop Safe' publicity campaign created and rolled out to support the safe reopening of businesses and the town centre.
- ▶ Created new email distribution lists for businesses and 'community champions' to keep them up to date about key coronavirus announcements and other news.
- ▶ Worked closely with partners across the county to ensure consistent and joined up messaging to help and support people through the pandemic.
- ▶ New Transforming Tamworth website created to promote the wide-scale regeneration projects taking place in Tamworth town centre.
- ▶ Development of a new website for Tamworth Castle.
- ▶ Added to our social media presence with new accounts on Instagram, LinkedIn and Next Door. The communications team now manages 16 channels across Facebook, Twitter, LinkedIn, Instagram, Next Door and YouTube.
- ▶ Social media statistics relating to our 14 core channels during 2021:
 - ▶ Total of 86,124 fans/followers across 14 main channels - an increase on every channel
 - ▶ 9,948 posts published by the communications team
 - ▶ More than 16 million impressions across the 10 channels where this data is recorded - up on 8, down on 1, no data for 1
 - ▶ Engagement - 309,282 (up on 8 channels, down on 5)
- ▶ Created and rolled out a major new residents' survey. 'Talk to Us Tamworth' received more than 500 responses and is set to become an annual exercise to improve two-way communication with our residents.
- ▶ Issued more than 160 press releases resulting in 290 positive news articles across a range of media outlets.

WHAT WE ACHIEVED IN 2021/22 cont.

REPAIRS CONTACT CENTRE



- ▶ Call handling performance – satisfaction feedback attaining 100%
- ▶ Over 1700 repairs raised.
- ▶ Gas servicing calls enabling legislative compliance circa 900.
- ▶ Service innovation to include creation of 'How To' videos for routine maintenance such as bleeding a radiator, unblocking a waste pipe, etc.

TAMWORTH INFORMATION CENTRE



- ▶ Sold 1152 tickets.
- ▶ Rebooked/ refunded 2235 tickets.
- ▶ 3097 enquiries for Tamworth based tourist information.

CUSTOMER EXPERIENCE



Striving to resolve all queries at the first point of contact including.

- ▶ Responded to 6,000 benefits queries.
- ▶ Handled 16,000 council tax enquiries.
- ▶ Actioned 3,000 estate issues.
- ▶ 5,000 housing needs enquiries dealt with.
- ▶ Responded to a further 15,000 general enquiries.

INFORMATION GOVERNANCE



- ▶ 540 Freedom of Information requests received – 92% of which were replied to within the prescribed timeframe.
- ▶ 397 complaints received and responded to.

ELECTION



- ▶ Complex combination of polls ran in May 2021 during the pandemic - accepted to be the most complex set of polls in history specifically due to areas not being co-terminus.
- ▶ Delivered a by election in February 2022 within minimum legislative timescales.
- ▶ Processed 2600 postal vote applications throughout the election period.

CANVASS AND REGISTRATION



- ▶ Implemented the new style canvass resulting in a canvass of 31,474 with an overall response rate of 94.09%
- ▶ Maintained an accurate and complete register throughout the year:
 - 12045 individual registration applications
 - 5878 deletions
 - 17061 amendments
- ▶ Issued 3154 postal vote applications.

THE ENVIRONMENTAL HEALTH TEAM

- ▶ Since March 2020 have been almost exclusively dealing with Covid management.
- ▶ Have led on coordinating Staffordshire authorities to develop Standard Operating Procedures which provided a consistent basis upon which Covid management was organised and governed across the County.
- ▶ Introduced Covid marshalls to provide valuable support.
- ▶ Supported locations for mobile testing units and vaccination centres to address the demand that has arisen.
- ▶ Throughout the summer, dealt with a significant level of illegal encampments that appeared with regularity.

WHAT WE ACHIEVED IN 2021/22 cont.

LAND CHARGES AND RIGHT TO BUY

During Jan 21 – Dec 21 the Legal Land Charges and Right to Buy Team completed the following:

- ▶ Right To Buy sales 30
- ▶ Full Searches 369
- ▶ Personal Searches 1460
- ▶ Leasehold Sales 7

DEMOCRATIC SERVICES

- ▶ Organised and supported 27 online committee meetings and from May 2021 administered & supported 43 in person committee meetings.
- ▶ Organised 19 Councillor induction and training sessions in person and online.
- ▶ Supported the Mayor with 46 events/visits.

HUMAN RESOURCES



- ▶ Implementation of e-recruitment module.
- ▶ Held basic ICT sessions for senior residents to enhance their knowledge and access to digital communications.

INFORMATION TECHNOLOGY



- ▶ Mobilised the workforce to total remote working within 2 weeks due to pandemic lockdown.
- ▶ Replaced /rebuilt 120 laptops to support remote working.
- ▶ Deployed 60 new desktops.
- ▶ Replaced 160 mobile phones.
- ▶ Provided an uninterrupted service desk function to support remote working.
- ▶ Identified and rolled out Teams lives event to support virtual council meetings.
- ▶ Implementation of Tamworth Borough Council's first ICT Strategy.
- ▶ New mobile phone contract procured and implemented resulting in an estimated £25k savings over a 3 year period.
- ▶ Development and implementation of the Orchard Portal – My Housing.
- ▶ Major upgrades to the 2 firewalls ensuring continued and improved cyber security.
- ▶ Secured grant funding of £5000 for improving cyber governance and £3000 for additional training for cyber security practitioners.

ASSETS



- ▶ Completion, handover and occupation of final properties on the Kerria site in Amington, including remaining houses, flats and retail unit with the scheme nominated for an award for social housing regeneration.
- ▶ Delivered both a response repairs and planned renewals programme to housing stock with high levels of customer satisfaction.
- ▶ Completed a number of neighbourhood improvement projects across Tamworth.
- ▶ Maintained high level of compliance in relation to gas servicing and electrical inspections.
- ▶ Completed detailed fire safety inspections of the high-rise blocks.
- ▶ Acquired a number of new properties for council housing through the acquisitions programme.
- ▶ Obtained planning consent for the development of new houses in Glascoate and worked with partner organisation to agree the refurbishment of an existing building along with new houses in Wilnecote.
- ▶ Repairs and Investment contractors delivered apprenticeships as well as social value projects across Tamworth as part of their commitment to the Tamworth contract.

WHAT WE ACHIEVED IN 2021/22 cont.

NEIGHBOURHOOD SERVICES



- ▶ Housemark ASB Accreditation plan was approved in December 2020 for 3 years.
- ▶ Decrease of £26,075.31 rent arrears from £507,450.79 in 2019/20 to £481,375.48 2020/21.
- ▶ Neighbourhood shielding list/EVP completed and returned to Staffordshire County Council with 100% successful contact.
- ▶ Introduced a revised £20,000 hardship fund, funded by the HRA, in the summer of 2020 in response to the impact of Covid-19.
- ▶ The new Housing Allocations Policy was approved by Councillors during November 2019 and was implemented in June 2020.
- ▶ Continued success at Eringden with the appointment of a Resident Support Officer and installation of CCTV. Escalation process and support for vulnerable residents and new lighting installed in Eringden communal landings.
- ▶ The WMCA CCTV system is continuously developing its technology meaning that Tamworth Borough's CCTV system will be at the forefront of CCTV within Staffordshire.
- ▶ The 'noise app' was introduced to capture problematic noise transfer due to restrictions around installing noise monitors in properties.
- ▶ Continued to support and develop the following involvement groups under the Tenant Involvement & Empowerment framework: Tenant Involvement Group, Tenant Consultative Group, Complaints Review Panel, ASB Service Improvement Group.
- ▶ Winter Relief 2020/2021 extended with Heart of Tamworth until June 2021 due to pandemic and success of assisting rough sleepers.
- ▶ Continued commitment to DA Safe accommodation working group with County.
- ▶ Successful bid to the (MHCLG) for RSI 4 money £100K, successful launch of project in June and runs until 30th June 2022.
- ▶ Successful bid from MHCLG for Protect Plus awarded £5K and £6400 for Cold Weather fund.
- ▶ Temporary accommodation success with no longer using private sector landlords and expanded temporary accommodation pilot made official.
- ▶ Rough Sleeper Count reported back to Homeless Link 2021 was 1 previous year was 5 so significant reduction of 4 in rough sleepers, excellent success.
- ▶ Developed Homeless Housing Options weekly surgeries at St John's and working with the third sector and RSI 4 team supporting.
- ▶ Continued success of keeping numbers in B&B below 10 all year.

COVID AND CUSTOMER SERVICES

Supported the organisational response to Covid -19 including:

- ▶ Almost 1,000 food bank referrals.
- ▶ Help and advice for over 1,200 business grants.
- ▶ 25 extremely clinical vulnerable customers signposted for priority shopping slots.
- ▶ Over 1,500 environmental health enquiries including signposting to covid testing within the borough.
- ▶ Enabled 46 family contact sessions.
- ▶ Repairs call centre called all tenants prior to attendance at their property to reassure customers of our covid prevention measures which enabled non-emergency repairs to be delivered.
- ▶ Targeted programme of weekly high rise vulnerability calls undertaken to provide support, assistance, signposting and referrals to appropriate agencies.
- ▶ Enhanced targeted support for all sheltered scheme tenants with tailored specific daily welfare calls, tenancy management planning, literature and a wealth of health and safety information throughout all schemes.

TAMWORTH BOROUGH COUNCIL CORPORATE PLAN 2022-2025

CONTACT US

To provide feedback specifically on the form and content of this Corporate Plan update, email enquiries@tamworth.gov.uk.

For more information about Tamworth Borough Council visit our website: www.tamworth.gov.uk

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Thursday, 17 March 2022

Report of the Leader of the Council

Regeneration projects - consultancy support

Exempt Information

None

Purpose

To approve the procurement approach to appoint external consultancy services in order to support the design, development and delivery of regeneration focused projects.

Recommendations

It is recommended that Cabinet:

1. Approves the procurement route for developing a project pipeline and completing business cases.
2. Approves the creation of a £200,000 retained fund for supporting the development of regeneration project pipeline and completing relevant business case submissions, funded through a transfer from the Transformation Reserve
3. Approves the procurement route for appointing technical support to enable and directly deliver projects.

Executive Summary

The regeneration team has two key functions:

1. The scoping and identification of regeneration projects and their development into business cases for either internal Council or external third party approval.
2. The practical enablement, delivery and management of approved regeneration projects that are financed through Council budgets or external funding

Over recent years, Government has opened bidding to funds for District and Borough Councils such as Town Deals, Future High Street Fund (FHSF) and Levelling up Fund (LUF). These funding applications need a wide variety of expertise in order to be successful and require significant levels of resource, both financially and in terms of staff time to complete.

Many of the larger funding bids require complex and comprehensive HM Treasury Green Book business case completion. The Green Book is guidance on how to appraise policies, programmes and projects, providing guidance on the design and use of monitoring and evaluation before, during and after implementation. The role of appraisal and evaluation is to provide objective analysis to support decision making. Where the use of significant new and existing public resources is required the proportionate employment of the Green Book and its supplementary business case guidance is mandatory. For example, The Future High Streets Fund bidding process required compliance with this rigorous financial approach.

The Borough Council's regeneration team does not have all of the necessary skills in house to complete business cases where projects are valued at many millions of pounds and are transformative in their impacts. Each project or proposal will require a different mix of

professional experience, specialist knowledge and skills for varying amounts of time. For example, a project that seeks the delivery of highways infrastructure would be different to a project that seeks the delivery of a college, heritage refurbishment or public realm.

Following the successful completion of a business case and award of funding the Borough Council then moves to a delivery phase. At this stage, more technical detail is often required. Business cases reflect high-level costs whereas practical project delivery requires these to be tested to a higher degree that cannot be done before funding has been confirmed and committed. The Council does not have all of the necessary technical skills in house to carry out technical evaluations of projects and sites, with each project requiring a different mix of professional technical skills. For example, a site that has a building in situ would have different requirements to a cleared site or one that needs significant remediation.

The following summary can be applied to the above:

- Project development and business case writing is a predominantly desk based, academic approach delivering written appraisals, studies and reports that tend to take a high level objective view.
- Technical Services are normally activities and research that can only be delivered on site or from actual site data. They are fact driven and subjective, specific to the demands of the particular project or location.

The Proposal

There are the following primary barriers to delivering a pipeline of projects, writing and funding business cases, and enabling/delivering projects:

- Funding the preparation of and delivering completed business cases at short notice to fit in with tight funding timescales;
- Delivering projects without the appropriate skills or knowledge within the team

To address these barriers it is proposed to take two separate procurement approaches;

1. One to ensure there is a constant pipeline of projects and capacity to compile complex business cases; the other;
2. To ensure officers can be supported in identifying and drawing down the correct technical support requirements for enabling and delivering projects, as and when needed.

Project pipeline and business case completion

External funding opportunities are often announced at short notice, with very tight timescales and comprehensive objectives to meet. In order to be prepared for any funding eventuality, Cabinet Members have asked the regeneration team to work up a pipeline of projects that are suitable for a variety of funding streams. This will be an ongoing process for the team and is part of their primary role.

The Borough Council was very fortunate with the bidding process for the Future High Streets Fund for two reasons:

1. In total there were 10 months from the award of grant to the submission of the final business case (this was extended due to Covid); and
2. the Government seed funded the delivery of the Green Book compliant business case with the allocation of £150K to the Borough Council.

To deliver a pipeline of Green Book compliant projects there needs to be a process put in place which seeks to speed up the Borough Council's ability to appoint consultants to a project and secondly provides the financial means of paying for them. This appointment could be in the anticipation of a bid to Government or simply the need to get a pipeline of schemes Green Book compliant and in place ready for the next opportunity, whatever that might be.

This has become a critical issue given that the criteria and process for round 2 of LuF is due for release in the Spring, for which the Borough Council is likely to want make an application.

Round 1, released in Summer 2021 only allowed a period of five months to pull together a compliant submission. Given that it took three months using our current procurement processes to get consultants on board with the FHSF submission, there is a clear issue that continuing with the same approach will not deliver a submission quickly enough to the LuF. In addition, Tamworth is defined as a tier 2 location for the purposes of the LuF and under current guidance does not qualify for bid development funding as seen in the case of the FHSF.

In addition to the LuF there is a high likelihood of other funding streams being released over the next few years that will need a similar approach, examples of which could be as follows: Shared Prosperity Fund (SPF); Cultural Levelling up Fund; National Heritage Lottery Fund; Heritage Action Zones.

To address all of the factors above, the following is proposed:

1. The appointment of a lead consultant with experience in preparing Green Book standard business cases and proven success in winning funding.
2. The creation of a retained fund for four years which allows projects to be worked up using the approach set out above.

The Council will use the Homes England Property Professional framework to procure a lead consultant to support the development of a pipeline of regeneration projects. The lead consultant will be procured for a period of 4 years and will manage a set of sub consultants.

The scope of works required from this support will be as follows:

- Creating a shortlist of projects from a long list
- Appraising and evaluating individual projects
- Writing and compiling all relevant information for required business cases and funding bids
- Providing professional property advice on land values, acquisitions and disposals, leading negotiations on behalf of the Council where required to at least Heads of Terms status.

The contract will not be a fixed fee, but based on framework rates and procurement regulations, drawing down support as required on a case-by-case basis. For each piece of work a detailed specification will be drawn up by the regeneration team, that the lead consultant will cost based on framework rates. This will then be approved by the appropriate officer or project board, with funds agreed and allocated before any work commences.

There is no fee to using the Homes England framework. The value of the works are likely to exceed procurement thresholds of £189,330 over the 4 years, so a further competition will be held through Homes England tested processes to ensure compliance with all levels of procurement regulations.

To meet the scope of works required by the Council, the following broad range of headline professional services can be drawn down through this framework.

- Property Advisory Services,
- Land and Property Agency Services,
- Estate Management Services,
- Property Investment,
- Appraisal,
- Development Monitoring and Financial Services,
- Valuation Services,
- Lead Consultant and Project Management Services,

- Development Structures and Partnering

This approach and framework was adopted for the Future High Streets Fund Green Book business case process and was very successful, albeit on a fixed fee basis rather than a call down. It allowed a focused, flexible approach to assembling and shortlisting projects with the ability to appoint very specialist skills that were needed to ensure a high level of success. The Council has significant experience in procuring the correct services for business case writings and as such knows the scope of services it requires.

4 years allows the Council to develop a working relationship with the contracted lead consultant, which from experience with previously used consultancy firms is highly beneficial, as the Council does not have to duplicate effort and resource on a regular basis, briefing and educating new professional teams. This call down, task based approach has also successfully been used with appointing Freeths solicitors to provide advice on capital focused regeneration schemes albeit using a different framework.

Technical project enablement and delivery

Developing a project to a standard such as HM Green Book requires a delicate balance of resource inputted against likelihood of return. No funding bid is ever guaranteed and often comprises of projects where the Council is not in direct control of assets or is not given full access to all data it actually needs at the time of writing. As such, applications always represent an educated risk that are as correct as possible at the point of submission.

Whilst compiling a business case is primarily done at a very high level in some cases, there is the occasional need for specialist technical advice on property or land. This advice is very different to that provided in developing projects and business cases and requires a different approach to and experience of project management and lead consultancy. In the case of FHSF technical support for the business case represented a non-invasive on site historic survey of the market street properties to test if assumed costs calculations for refurbishment were likely to be accurate, based on their actual structural condition.

In most cases, technical work proceeds once a business case and attached funding is approved as:

- Works are often expensive and represent too large a risk at an earlier stage.
- Works are often visible and high profile, drawing attention to activity that may be commercially sensitive.
- Third party stakeholders might not grant site access or share relevant commercial or private information until there is a stronger reason to do so.

Once a project is approved for funding, there is often an immediate requirement to draw down technical site support as quickly as possible, in order to meet project timelines. In the case of FHSF the programme required a diverse set of immediate datasets/surveys including a measured building survey with elevations; utilities mapping, asbestos and bat surveys.

To address the above need, the following is proposed:

1. The Council signs up to a framework specifically designed to give call down access to technical consultancy services for physical build focused projects.
2. Services are funded through individual pre agreed project budgets.

It is proposed that the Council will use the Pagabo Lot 1 Framework to procure technical consultancy services and related project management. This service will support the Council in flexibly and rapidly drawing down technical advice for business cases; to enabling projects to practical delivery of projects on the ground.

Unlike the project pipeline development and business case support, the regeneration team will not always immediately know what advice they need to enable and deliver projects from as each project is likely to be very different needs. This is identical to the nature of the FHSF programme where support has been required in scoping technical consultancy requirements prior to procurement and project managing the work.

Learning from the FHSF programme this framework has been chosen as it allows for the direct award of project management / quantity surveying resource.

The project manager / quantity surveyor resource is used as a gateway to scope and identify what the Council actually requires in terms of technical support for its project, ensures it is designed in the most efficient manner, and then allows appointment of specified services off their PCR 2015 compliant framework. Lot 1 is valid until April 2024 and there is no minimum requirement for the Council to use this framework.

Lot 1 of the Pagabo framework allows the Council through consultancy firm Faithful and Gould (F&G) to draw down support from 17 specialist disciplines please see appendix 1 for more details. .

The advantages to using this framework are:

- F&G can be used as an educated sounding board to ensure the Council gets the support that is actually needed, saving time and ensuring budgets are spent on the correct works.
- F&G will create detailed project specifications, reducing reliance upon Council resource that can be focused on other critical activity. .
- F&G will project manage the contracted works as a single point of contact, limited resource pressures on TBC staff where multiple technical services are used on a project.
- Staff can learn and be upskilled from being part of this process
- There are over 500 approved suppliers in the supply chain, ensuring access to services and capacity at all times.
- Pagabo provide experienced procurement advice throughout the project from feasibility, to handover to completion. This can support and supplement the Council's internal procurement capacity at no significant extra cost.

The contract will not be a fixed fee, but instead based on framework rates and procurement regulations that will be drawn down as required on a case-by-case basis. An early engagement meeting is held with Faithful and Gould (F&G) to determine the correct scope of services required for each project. Based on this early engagement, Faithful and Gould prepare a detailed specification and costing that is then approved by the Council. F&G then project manage the whole process on behalf of the Council as a lead consultancy.

There is a fee of 3% to use Pagabo, but this is absorbed within the lead consultancy (F&G) rates. It is felt the fee is mitigated through the intensive competitive process suppliers have to go through, to get on the framework. The value of the works is likely to exceed procurement thresholds of £189,330, based on current live projects. Lot 1 is compliant with procurement regulations with regards purchasing of services over this threshold. Each project will have its own agreed budget from which the works will be funded.

Options Considered

In order to come to the preferred delivery options, the Regeneration team has conducted research with different Councils, representatives from procurement frameworks and currently engaged consultants - where there is no conflict of interest or benefit with regards their involvement in this work. Please see appendix 2 for a detailed appraisal of framework options, that were considered.

Resource Implications

The Regeneration team currently consists of the following roles:

- 1 x Senior Regeneration Officer – grade G – 0.64 full time equivalent – permanent.
- 1 x Regeneration Officer – grade F – 0.8 full time equivalent – permanent.

The Head of Economic Development and Regeneration also commits a minimum of 50% of their time to regeneration activity based on identified corporate priorities.

Both procurement routes ensure there are skilled, qualified professionals available when required to support the wide variety of projects the team is both currently involved in and those being worked into a shortlisted pipeline.

Developing projects and delivering them, requires a huge range of skills that cannot be met either from within the team or the wider authority. The procurement routes detailed in the sections above represent the most cost and time effective approaches of supplementing and supporting the activity of the Regen team. The appointment of lead consultants and project managers, who coordinate teams of sub consultants and contractors, ensures that the focus of Council officers remain on delivering against wider corporate regeneration priorities.

As both frameworks have been competitively procured and are transparent in their fee structures the Council can be confident in its ability to ensure value for money is achieved in all purchased services.

The approach recommended provides an efficient procurement strategy, with minimal reliance upon the resources and capacity in the Council procurement teams. The 4 year approach to the Project Development services means once the process complete little further intervention is required from TBC procurement. The Pagabo framework is already procured and also benefits from a relationship manager who in affect acts as an additional Council procurement resource, with an advisory service to ensure that their policies and all national procurement regulations are complied with. By using the direct appointment method from Pagabo, with project specification support from Faithful and Gould, the Council will save a considerable amount of time and officer capacity compared to a Council led open tender process.

Financials

There will be a retained fund of £200k to solely support the development of a pipeline of projects and writing business cases over a 4 year period. This will be funded from the forecast balance remaining on the transformation reserve of £346k (February 2022). The Future High Streets Fund business case process cost £150,000 but was enabled and funded directly by Government. The £200k in the retained fund, may not be needed, but allows flexibility to apply for larger grants where enabling funding isn't covered. It is however expected over 4 years that the procurement regulations threshold of £189,330 is highly likely to be exceeded.

Works contracted under the Technical Consultancy support approach, will be funded from individual project budgets that will be approved separately via appropriate governance and in line with corporate financial regulations. The framework only operates until April 2024, but there is a likelihood, based on live projects that the procurement regulations threshold of £189,330 is highly likely to be exceeded.

Legal/Risk Implications Background

The two frameworks proposed for use in this report are compliant with all current legislation. The Council procurement team have been actively consulted on both approaches and support them.

Both approaches have one liable party to manage sub contractors and relevant contracts. This limits the requirement and pressure on capacity, for the Council to manage multiple contracts, reducing the risk of dispute. The lead consultants / project management have industry knowledge and up to date experience that Council officers do not and cannot reasonably be expected to have.

With regards the project development it should be noted that external applications for funding is never certain, so the work needed to develop a project pipeline is at risk. In order to develop a pipeline of projects that may be suitable for future funding applications the Council will need to spend the money in advance without guarantee of a definite project return. That said the wider the variety of projects ready for delivery and the quality with which they are designed, the higher the likelihood of success in achieving external grant funding.

The Pagabo approach allows the Council to work up detailed specifications with experienced project managers and quantity surveyors (through F&G) before going out to a supplier. This reduces the risk that the Council procures something it either does not fully understand or does not truly need.

The Pagabo framework expires in April 2024, so only gives a relatively short window, with which to use it and their current supply chain. This gives the opportunity for the Council to learn about the framework in detail through using it, without substantial risk and can reassess its approach to technical consultancy in 18 months time. The Council is not committed to any minimum spend on Pagabo, it merely has to sign up to the framework and its terms and conditions.

Equalities Implications

It should be noted that only organisations that have gone through the Homes England and Pagabo framework appointment systems can be procured through the approach detailed. This will exclude some businesses from being able to deliver work required. Both frameworks are actively engaged with the market and ensure there is a balanced mix of suppliers, from Small to Medium Businesses to larger national and international organisations.

Environment and Sustainability Implications (including climate change)

There are no direct environment and sustainability issues arising from this process. It should be noted, the appointment of professionals from different disciplines will contribute to Council led projects benefitting from up to date advice. This gives the opportunity for best practice on current sustainability and environmental issues, to be fully integrated into projects.

Background Information

None

Report Author

Matthew Fletcher – Head of Economic Development and Regeneration
Laura Patrick – Regeneration Officer

List of Background Papers

More information on the Green book can be found here

<https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government/the-green-book-2020>

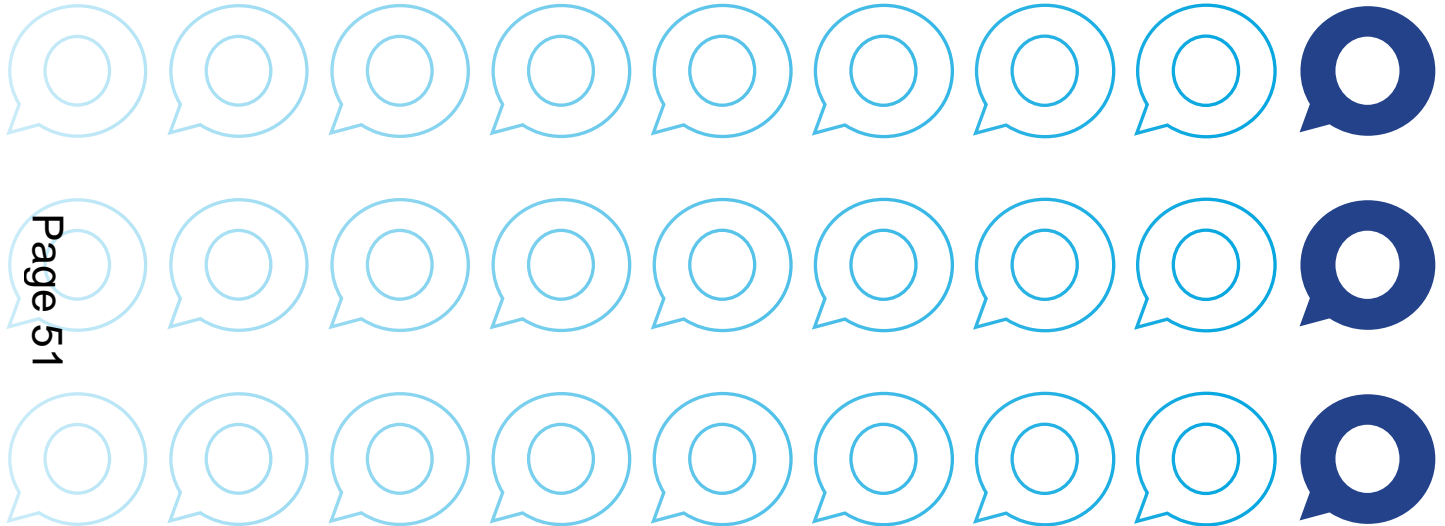
Appendices

Appendix One – Pagabo scope of services - Lot 1.

Appendix Two – Framework Options

PAGABO

Simply better procurement



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User Guide

Professional Services Framework

Let's build it better

Getting projects off the ground can be challenging and time consuming.

At Pagabo, we aim to make it quicker, simpler and more effective.

Organisations right across the UK are taking advantage of our unique approach to procurement, from NHS Trusts and Local Authorities to private sector businesses.

Our Professional Services Framework connects you to a range of quality consultants and construction service professionals to help you plan, develop and deliver your next project. It's free to access, easy to use and fully compliant with all UK and EU procurement law.

This user guide provides all the information you need to get started, including which consultants are available within each region.

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Professional Services Framework

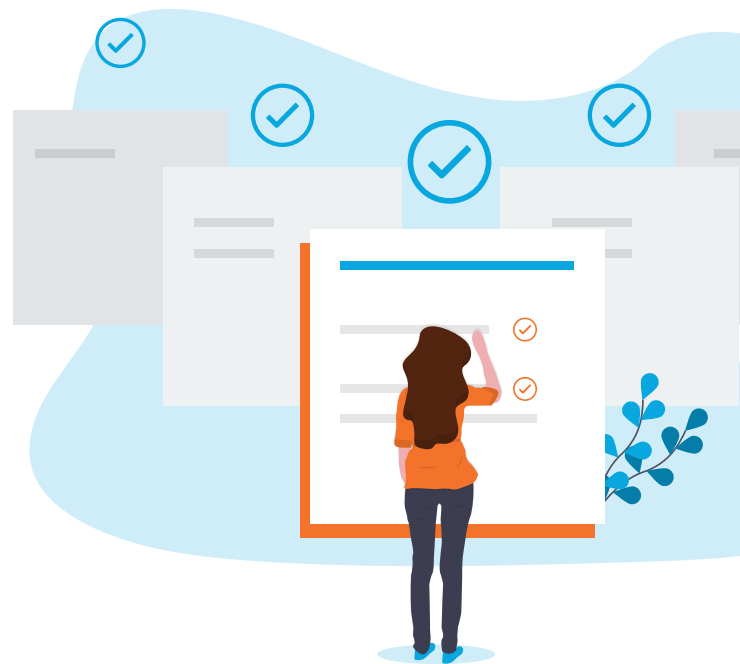
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Supplier breakdowns by Lot:

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Lot 13	Sustainability & Environmental Consultancy	22
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Lot 15	Heritage	24
Lot 16	Health & Safety Consultant inc. Principal Designer Services	25
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Other frameworks available from Pagabo:

- Dynamic Purchasing System for Small Works
- Medium Works Framework
- Major Works Framework
- Refit and Refurbishment Framework
- Developer Led Framework
- ICT Solutions Framework
- Furniture Solutions Framework
- Regional Cleaning Services Framework
- Catering Food Supplies Framework



**To find out more about any of our frameworks,
please give us a call on 01482 975883.**

Why choose a Pagabo framework?

We're a different kind of framework provider. With over 100 years' experience in procurement, we understand your challenges and work to deliver the most value possible from your projects.

3 reasons we're different:

- 1. We deliver:** We won't let you down when it comes to delivering the number of bids your project needs. We work closely with the consultants to make sure it happens.
- 2. No project, no fee:** We don't believe in engagement fees. We share the risk in the early stages of the process by only charging fees once your project officially starts.
- 3. Your contract, your way:** Our frameworks are compatible with any contract type, whether it's NEC, JCT or your own organisations.



Some other key benefits of using Pagabo:



Simplicity

We take the complication out of procurement, so all our frameworks are free to access and easy to use.



Support

We provide support and advice throughout your project, from feasibility to handover through to completion.



Transparency

We don't hide costs. Our fees are fully transparent and charged as an agreed percentage of the overall project.



Stability

We monitor the financial stability of our consultants to ensure they continue to be a safe pair of hands for your project.



Flexibility

Whether it's a Direct Award or Further Competition, our frameworks support a range of procurement processes.



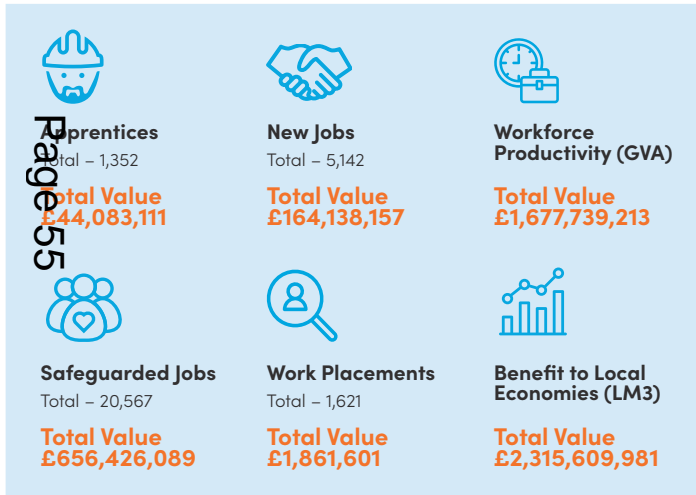
Value for Money

Each of our consultants has met rigorous selection criteria around quality of work and competitive pricing.

Delivering real social value

Driving real, meaningful social value and social impact is at the heart of what we do at Pagabo. Through our unique Social Value Calculator, we are able to calculate your social, economic and environmental impact and the financial value, in real monetary terms, of that impact. Pagabo adds value through our frameworks by supporting social value at the feasibility, business case development, planning, procurement, delivery and maintenance stages of your investments.








As of October 2021, our frameworks enabled £4.76 billion in social value.



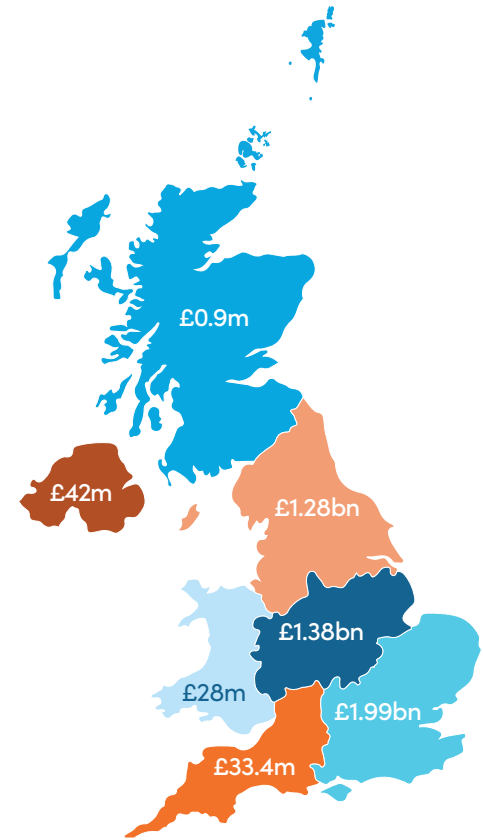
And, as part of our ongoing account management support, we can provide you with all the information and tools you need to report on the social value impact of your project.

To find out more about social value & view the latest figures please visit pagabo.co.uk/social-value

Key

-  Scotland
-  The North
-  The Midlands
-  South West
-  Wales
-  South East
-  Northern Ireland

Total social & economic impact
£4.76billion



End-to-end support throughout the life of your contract

Our job doesn't stop when you have chosen a framework. We work closely with you throughout the life of the project, providing support and guidance to make sure that you get the most value from your contract.



The assistance we provide:

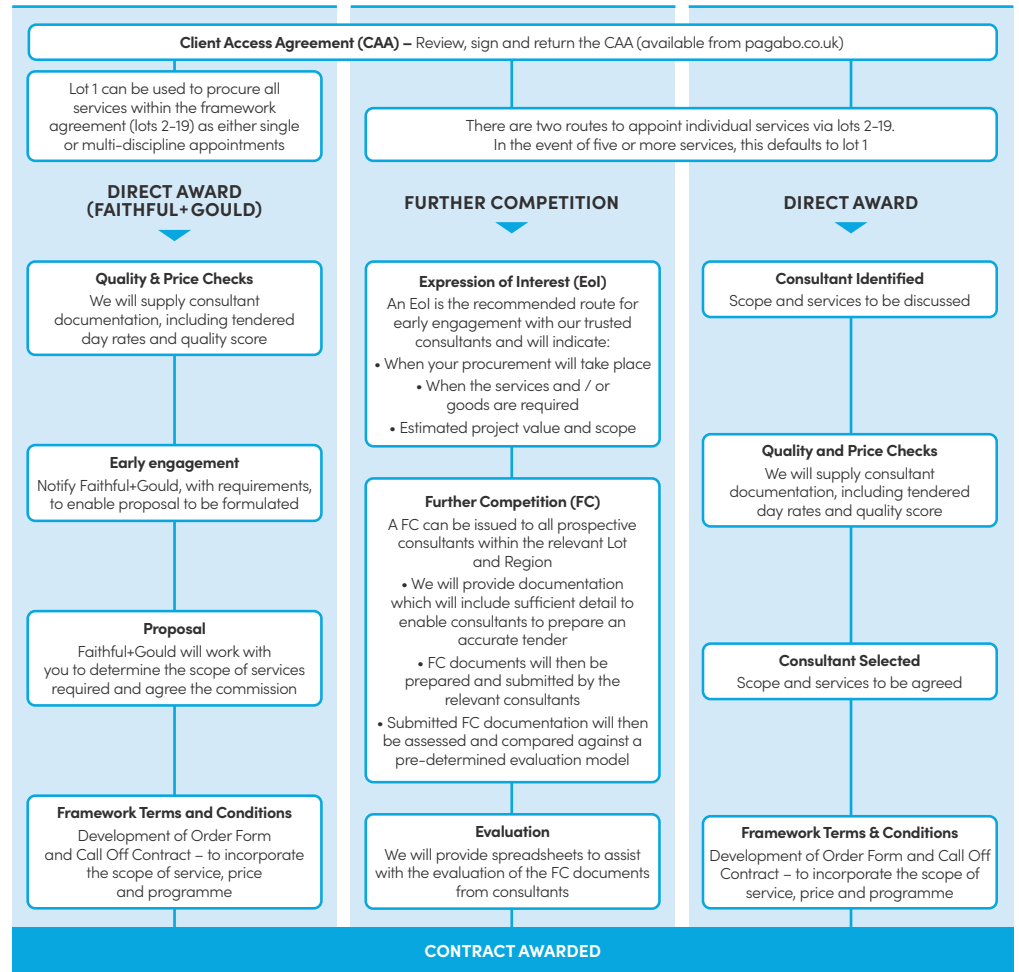
- ✓ Project Feasibility Assessment
- ✓ Procurement Advice
- ✓ Early Consultant Engagement
- ✓ Documentation Preparation
- ✓ Tender Process Management
- ✓ Tender Evaluation Facilitation
- ✓ Consultant On-Boarding
- ✓ Establishing Pre-Construction Services Agreement
- ✓ KPIs Management & Evaluation
- ✓ Consultant Relationship Management

Appointing your supplier

Whether it's a Direct Award or Further Competition (FC), our frameworks make appointing a supplier easier and more effective.

Throughout the process, we help co-ordinate the appointment on your behalf, liaising with you, the contracting authority and the consultants.

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Professional Services Framework £Unrestricted

OJEU Reference: 2020/S 079-187629

Dependable expertise for every project

Quickly and easily procure the right consultants and professional services for your next construction or development project, with our Professional Services Framework.

With no minimum or maximum project value restrictions, the framework provides simple, flexible and transparent access to 75 carefully selected providers, split across 19 different lots and regional areas.

Either appoint a single national provider using Lot 1 or individually through Lots 2-19.

This guide offers a summary of the services which are available. For a full scope of services, please get in contact with us.



"The Professional Services Framework provides Pick Everard and our supply partners with a flexible yet robust procurement route for our clients to appoint us to deliver a wide range of consultancy services."

Alex Hamilton-Jordan, Head of Strategic Partnerships, Pick Everard



"The Professional Services Framework has become an industry recognised procurement solution and continues to go from strength to strength. Faithful+Gould are proud to be associated with such a successful framework and we look forward to continuing to utilise it to support our growing number of Public Sector clients."

Ian Plant, Framework Director, Faithful+Gould



Framework facts



Project Value
£Unrestricted



Term
Until April 2024

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Lots
19



Type
**Further Competition
or Direct Award**



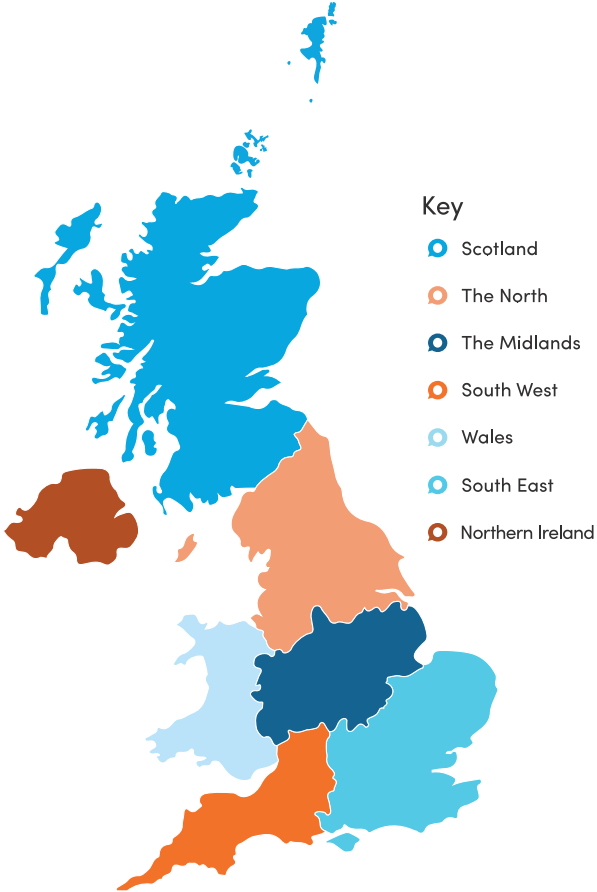
Consultants
**73 regional
and national**



Contracting Authority
**The Education
Alliance Trust**

Lot & Supplier Breakdown

- Lot 1 Complete Service Solutions
- Lot 2 Civil Engineering
- Lot 3 Structural Engineering
- Lot 4 Cost Consultants & Quantity Surveyors, Project & Programme Manager, Lead Consultant
- Lot 5 Building Surveying
- Lot 6 Building Services Engineering
- Lot 7 Architectural Design Services
- Lot 8 Landscape Architectural Design Services
- Lot 9 Site Supervisor / Clerk of Works
- Lot 10 Asset / Estate Management
- Lot 11 Funding Solutions & Bid Writing
- Lot 12 Archaeological Services
- Lot 13 Sustainability & Environmental Consultancy
- Lot 14 Town & Master Planning
- Lot 15 Heritage
- Lot 16 Health & Safety Consultant inc. Principal Designer Services
- Lot 17 Fire Engineer
- Lot 18 Asbestos Consultancy
- Lot 19 Water Consultancy inc. Legionella Monitoring



Lot 1 Complete Service Solutions

This lot enables you to access the full range of services (everything from Lots 2 to 19) under a single national provider.

Our Lot 1 provider, Faithful+Gould, will work with you to develop the commission brief and then assemble the best team to deliver your project effectively. In the event of five or more services, the project will default to lot 1.

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓

Full range of services, including:

- Civil Engineering
- Structural Engineering
- Cost Consultants & Quantity Surveyors, Project Programme Manager, Lead Consultant
- Building Surveying
- Building Services Engineering
- Architectural Design Services
- Landscape Architectural Design Services
- Site Supervisor / Clerk of Works
- Asset / Estate Management
- Funding Solutions & Bid Writing
- Archaeological Services
- Sustainability & Environmental Consultancy
- Town & Master Planning
- Heritage
- Health & Safety Consultant inc. Principal Designer Services
- Fire Engineer
- Asbestos Consultancy
- Water Consultancy inc. Legionella Monitoring

To find out more about the Professional Services Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 2 Civil Engineering

Full range of services, including:

- Feasibility studies and option appraisals
- Design and specifications
- Master planning
- Ground investigations and site assessments
- Planning advice
- Condition assessments and surveys
- Specialist design services

Projects such as:

- Highways and roads
- Drainage and utilities
- Drainage and infrastructure
- Rail
- Bridges
- Tunnels

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Adept Consulting Engineers	✓		✓				
AECOM	✓	✓	✓	✓	✓	✓	✓
Atkins	✓	✓	✓	✓	✓		✓
Baker Hicks	✓				✓	✓	✓
Cambria Consulting			✓	✓	✓		
Design2e				✓		✓	
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Mason Clark Associates		✓					
Mott MacDonald							✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Sir Frederick Snow & Partners		✓				✓	
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 3 Structural Engineering

Full range of services, including:

- Feasibility studies and option appraisals
- Design and specifications
- Master planning
- Ground investigations and site assessments
- Planning advice
- Condition assessments and surveys
- Specialist design services

Projects such as:

- New build and refurbishment works
- Bridges and infrastructure
- Residential
- Offices
- Hotels
- Leisure centres

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Adept Consulting Engineers	✓		✓				
AECOM	✓	✓	✓	✓	✓	✓	✓
Atkins	✓	✓	✓	✓	✓		✓
Baker Hicks	✓				✓	✓	✓
Cambria Consulting			✓	✓	✓		
Concertus Design & Property Consultants						✓	
Design2e				✓			
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Mason Clark Associates		✓					
Mott MacDonald							✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Sir Frederick Snow & Partners		✓				✓	
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 4 Cost Consultants & Quantity Surveyors, Project & Programme Manager, Lead Consultant

Full range of services, including:

- Contract administration
- Employers agent
- Project management
- Cost analysis and budget estimates
- Programme management
- Lifecycle costing

Projects such as:

- Refurbishment of a museum and library
- Construction of new build offices
- Extension of existing educational accommodation
- Planning and construction of new highway link road
- Replacement of existing leisure facility

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
EdgePS	✓		✓	✓	✓	✓	✓
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Identity Consult		✓					
Mace	✓	✓	✓		✓	✓	✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Rider Levett Bucknall UK						✓	
RPS Consulting Services				✓			
Turner & Townsend	✓	✓	✓	✓	✓	✓	✓
WH Stephens	✓	✓	✓	✓	✓	✓	✓
WT Partnership	✓	✓	✓	✓	✓		✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 5 Building Surveying

Full range of services, including:

- Feasibility studies and options appraisal
- Condition surveys and planned maintenance programmes
- Design and specification of new build and refurbishment works
- Acquisition surveys
- Dilapidation surveys
- Legal compliance

Projects such as:

- Refurbishment of existing premises
- Surveys for property acquisition and disposal programmes
- Design and management of new build properties and extensions
- Condition surveys and development of planned maintenance programme
- Legal compliance surveys and advice
- Surveys and advice in relation to the party wall

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
AHR Building Consultancy						✓	
Atkins	✓				✓		✓
EdgePS	✓	✓	✓	✓	✓	✓	✓
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Mace	✓	✓	✓	✓	✓	✓	✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Rider Levett Bucknall UK		✓	✓	✓			
WH Stephens	✓	✓	✓	✓	✓	✓	✓
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 6 Building Services Engineering

Full range of services, including:

- Feasibility studies and options appraisals
- MSE condition surveys and site assessments
- Mechanical design
- Electrical design
- Fire alarms
- Energy assessments

Projects such as:

- Refurbishment and new build
- Boiler and heating system replacement
- Lift and upgrades
- Fire alarm installations
- Energy reduction implementation
- Utilities upgrades

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
AECOM	✓	✓	✓	✓	✓	✓	✓
Atkins		✓	✓	✓	✓		✓
Baker Hicks	✓					✓	
Concertus Design & Property Consultants						✓	
DarntonB3	✓			✓			✓
Delap and Waller							✓
Eta Projects	✓						
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
McCann & Partners			✓	✓	✓	✓	
Pick Everard	✓	✓	✓	✓	✓	✓	✓
S I Sealy & Associates		✓	✓		✓		
Services Design Associates		✓					
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 7 Architectural Design Services

Full range of services, including:

- Feasibilities and options appraisals
- Concept design
- Master planning
- Full design services
- Building Information Modelling (BIM)
- Interior design
- Principal designer

Projects such as:

- Significant refurbishment and modelling of existing buildings
- New build developments such as leisure, education, offices or civic buildings
- Interior design and space utilisation
- Master planning

Project

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
AECOM							✓
Atkins	✓	✓	✓	✓	✓		✓
Baker Hicks	✓					✓	
Boswell Mitchell & Johnston	✓						
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
GSSArchitecture				✓		✓	
Mace	✓	✓	✓	✓	✓	✓	✓
MICA Architects					✓		✓
Moss Architecture . Interiors			✓				
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Purcell Architecture		✓	✓	✓	✓	✓	
Space & Place	✓	✓	✓	✓	✓	✓	✓
Stem Architects		✓					

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Lot 8 Landscape Architectural Design Services

Full range of services, including:

- Landscape architecture for urban and rural spaces
- Site layouts and ergonomics
- Consultation and planning support
- Preparation of management and maintenance schedules

Projects such as:

- Refurbishment and redevelopment of existing sites and buildings
- Improving public access to external habitats
- New site developments and construction
- Planning and site appraisals
- Re-landscaping of external areas

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Atkins	✓	✓	✓	✓	✓	✓	✓
Austin Smith Lord	✓		✓	✓	✓		
Colour Urban Design	✓	✓	✓	✓	✓	✓	✓
Concertus Design & Property Consultants						✓	
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Mott MacDonald	✓	✓	✓	✓	✓	✓	✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Urban Green		✓					
WSP UK	✓	✓	✓	✓	✓	✓	✓

Lot 9 Site Supervisor / Clerk of Works

Full range of services, including:

- Site inspections prior to construction works commencing
- Study of drawings and specifications
- Monitoring of setting out
- Inspection of materials
- Inspection of building works during construction
- Monitoring of witnessing and testing

Projects such as:

- Refurbishment of existing buildings
- Extension to existing buildings and structures
- Construction of new buildings and infrastructure

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Airey Miller						✓	
Bellrock Property and Facilities Management		✓	✓	✓		✓	
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Hickton Consultants	✓	✓	✓	✓	✓	✓	
IDP		✓	✓	✓	✓		
Pellings						✓	
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Waldeck Associates		✓	✓	✓			
Wardell Armstrong	✓						
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 10 Asset / Estate Management

Full range of services, including:

- Strategic property advice
- Property valuations, rent reviews and ratings
- Acquisition and disposals
- Dilapidations
- Landlord and tenant
- Lease agreements and renewals

Projects such as:

- Service for the acquisition and disposal of property assets
- Rent reviews and negotiations
- Preparations of business cases
- Provide complete rating service

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Hollis	✓	✓	✓	✓	✓	✓	✓
NPS Property Consultants		✓		✓	✓	✓	
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Shared Agenda Solutions		✓	✓			✓	
Stradia	✓	✓	✓	✓	✓	✓	✓
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 11 Funding Solutions & Bid Writing

Full range of services, including:

- Bid preparation and scoping
- Assessment and response planning
- Workshop facilitation
- Bid response drafting and editing
- Design and document layout

Projects such as:

- Condition Improvement Fund (CIF) applications
- Central government funding applications
- Support for service provision bids
- European grant applications
- Planning of design competitions and e-tendering

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
AM Bid	✓	✓	✓	✓	✓	✓	✓
E3 Cube		✓	✓		✓		
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Stradia	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 12 Archaeological Services

Full range of services, including:

- Archaeological desk based assessments (DBA)
- Field based archaeological surveys
- Archaeological excavations
- Archaeological aerial surveys
- Trial trenching
- Geophysical surveys

Projects such as:

- New builds
- Highways and infrastructure projects
- Master planning

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Mott MacDonald	✓	✓	✓	✓	✓	✓	✓
RSK Environment	✓	✓	✓	✓	✓	✓	
The Environment Partnership		✓	✓	✓	✓		
Wardell Armstrong	✓	✓	✓		✓	✓	
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 13 Sustainability & Environmental Consultancy

Full range of services, including:

- Building Research Establishment Environmental Assessment Method (BREEAM)
- Sustainability and carbon management advice
- Post occupancy evaluation
- Environmental impact assessments
- Environmental planning
- Noise control consultancy
- Habitat surveys and appraisal

Projects such as:

- Refurbishment and redevelopment of existing sites and buildings
- New site developments and construction
- Planning and site appraisals
- Infrastructure and utilities upgrades
- Funding and grant applications for improved environmental and sustainable performance

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Atkins	✓		✓	✓	✓	✓	✓
Cundall							✓
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Focus Consultants		✓	✓			✓	
Hollis	✓				✓		✓
Mott MacDonald	✓	✓	✓	✓	✓	✓	✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Rider Levett Bucknall UK		✓	✓	✓		✓	
RSK Environment	✓			✓	✓		
Urban Green		✓					
WSP UK	✓	✓	✓	✓	✓	✓	✓

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Lot 14 Town & Master Planning

Full range of services, including:

- Town planning
- Master planning
- Transportation planning and traffic management
- Flood risk assessments
- Planning applications
- Public engagement during the planning application process

Projects such as:

- Urban regeneration and renewal
- Civils and infrastructure
- Green building design

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Atkins	✓	✓	✓	✓	✓	✓	✓
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Lichfields							✓
Mott MacDonald	✓	✓	✓	✓	✓	✓	✓
NORR Consultants	✓						
Roberts Limbrick						✓	
RPS Consulting Services						✓	
The Environment Partnership		✓	✓	✓	✓		
Urban Green		✓					
Wardell Armstrong	✓						
WSP UK	✓	✓	✓	✓	✓	✓	✓

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Lot 15 Heritage

Full range of services, including:

- Historic building assessments
- Heritage impact assessments
- Historic building survey
- Creation of heritage statements
- Pre-planning heritage advice

Projects such as:

- New builds
- Civils and infrastructure
- Master planning
- Refurbishment of historic buildings
- Maintenance of historic buildings

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Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Atkins	✓						✓
Austin Smith Lord	✓	✓	✓	✓	✓	✓	
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Frederick Gibberd Partnership				✓			
Haverstock Associates			✓			✓	
Lichfields							✓
Mason Clark Associates		✓					
Mott MacDonald	✓						✓
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Purcell Architecture		✓	✓	✓	✓	✓	
RSK Environment Limited	✓				✓	✓	
The Environment Partnership		✓	✓	✓	✓		
Watts Group							✓
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 16 Health & Safety Consultant inc. Principal Designer Services

Full range of services, including:

- Ensure on-site construction and design management (CDM) compliance
- Attend design review meetings
- Carry out RIDDOR investigations
- Risk assessments
- Policy writing
- Safety auditing

Projects such as:

- New builds
- Civils and infrastructure
- Urban regeneration and renewal
- Bridges and infrastructure
- Refit and refurbishment

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Atkins	✓				✓		✓
E3 Cube			✓		✓		
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Glancy Nicholls Architects				✓		✓	
Hollis							✓
Keelagher Okey Associates		✓	✓		✓		
Mason Clark Associates		✓					
Pick Everard	✓	✓	✓	✓	✓	✓	✓
Rider Levett Bucknall UK		✓	✓	✓		✓	
The Fulker Consultancy				✓		✓	
Townsend and Renaudon	✓						
Turner & Townsend	✓	✓	✓	✓	✓	✓	✓
WSP UK	✓	✓	✓	✓	✓	✓	✓

To find out more about the Professional Services in Construction & Premises Framework, please give us a call on 01482 975883 or visit pagabo.co.uk

Lot 17 Fire Engineer

Full range of services, including:

- Creation of fire management strategies
- Review of current fire management strategies
- Post-fire investigation and analysis
- Assessment of hazards and risks of fire
- Drafting, implementation and enforcement of fire safety legislation

Projects such as:

- New builds
- Refit and refurbishment
- Leisure centres

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Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Atkins	✓	✓	✓	✓	✓	✓	✓
Cundall	✓						✓
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Hydrock Consultants	✓	✓	✓	✓	✓	✓	
International Fire Consultants	✓	✓	✓	✓	✓	✓	✓
Mott MacDonald		✓	✓	✓	✓	✓	✓
Turner & Townsend	✓	✓	✓	✓	✓	✓	✓
WSP UK	✓	✓	✓	✓	✓	✓	✓

Lot 18 Asbestos Consultancy

Full range of services, including:

- Surveys and sampling
- Management consultancy service for asbestos management and abatement
- Air monitoring and analytical services
- Auditing of asbestos removal works
- Asbestos training programme

Projects such as:

- Training of staff in asbestos awareness
- Preparation of scope of works for asbestos abatement works
- Undertaking asbestos surveys and preparation of associated reports
- Advice regarding the management of asbestos containing materials

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Environmental Essentials	✓			✓	✓		✓
Environtec	✓	✓	✓	✓	✓		
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Frankham Consultancy						✓	
HBE							✓
Lucion Environmental	✓	✓		✓	✓		✓
RSK Environment	✓	✓	✓			✓	
Tersus Consultancy		✓	✓	✓	✓	✓	
Thames Laboratories			✓			✓	
WH Stephens	✓	✓	✓	✓	✓	✓	✓
WSP UK	✓	✓	✓	✓	✓	✓	✓

Lot 19 Water Consultancy inc. Legionella Monitoring

Full range of services, including:

- Water testing
- Legionella testing and management
- Swimming pool water testing
- Chemical testing and appraisal
- Risk assessments and reviews

Projects such as:

- Assessment of risks and provision of mitigation reports and procedures
- Validation of effectiveness of controls and barriers
- Ongoing water testing, review and maintenance of record

Supplier	Scotland	North	Midlands	South West	Wales	South East	Northern Ireland
Bellrock Property and Facilities Management		✓	✓	✓		✓	
Environtec	✓	✓	✓	✓	✓	✓	
Faithful+Gould	✓	✓	✓	✓	✓	✓	✓
Frankham Consultancy						✓	
HBE	✓	✓	✓	✓		✓	✓
RSK Environment						✓	

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November 2021

Procurement Route	Pros	Cons	Scope of Services Available	Framework Fee
Pagabo- Lot 1	<ul style="list-style-type: none"> •Fully managed procurement service from chartered procurement professionals •Flexible with sub-consultants appointed by a lead consultant •Use of Social Value Calculator included •Ability to call off, mini comp, or full tender with each lot •Opportunity to direct award through Lot 1- speeds up delivery whilst meeting procurement criteria •500 approved suppliers on supply chain from SME to National Companies Provide a Resource driven proposal •Lot 1 covers 18 disciplines •Supports limited Resource • Framework is user friendly •Full PCR2015 compliance pack available 	F&G are the only consultant who can appoint full multi-disc team via the Direct Award approach	<ul style="list-style-type: none"> •Civil Engineering • Structural Engineering • Cost Consultants & Quantity Surveyors, Project & Programme Manager, Lead Consultant • Building Surveying • Building Services Engineering • Architectural Design Services • Landscape Architectural Design Services • Site Supervisor / Clerk of Works • Asset / Estate Management • Funding Solutions & Bid Writing • Archaeological Services • Sustainability & Environmental Consultancy • Town & Master Planning • Heritage • Health & Safety Consultant inc. Principal Designer Services • Fire Engineer • Asbestos Consultancy • Water Consultancy inc. Legionella Monitoring 	3% fee paid by – no fee to TBC
Procure Partnerships	<ul style="list-style-type: none"> •Flexibility regarding number of sub-consultants that a lead consultant can appoint 	<ul style="list-style-type: none"> •Sub-consultants need to be appointed from within the discipline lots under the framework 	<ul style="list-style-type: none"> •Project Management •Quantity Surveying •Architectural Design •Structural Engineering 	£250 per consultant

	<ul style="list-style-type: none"> • Access fees of £250 per consultant • 12 forms of contract to choose from • Tender support from procurement manager (but not a fully managed procurement such as Pagabo) 	<ul style="list-style-type: none"> • Procurement support is not a fully managed service • No additional value adds offered • Construction focussed Framework 	<ul style="list-style-type: none"> • Mep Design • Building Surveying 	
<p>Homes England – Professional Property Advisory Services</p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);">Page 84</p>	<ul style="list-style-type: none"> • Fully PCR2015 compliant • Nil Cost to Access • TBC has proven success using this Framework • Central Government led framework and therefore no involvement with private Organisation • Extensive guidance documents and templates to support the tender process 	<ul style="list-style-type: none"> • Sub-consultants are required to be registered to the Homes England framework as a supplier. Therefore flexibility around the consultant team is limited 	<ul style="list-style-type: none"> • Property Advisory Services • Land and Property Agency Services • Estate Management Services • Property Investment, Appraisal, Development • Monitoring and Financial Services • Valuation Services • Lead Consultant and Project Management Services • Development Structures and Partnering • General services 	No Fee
CCS	<ul style="list-style-type: none"> • Nil cost to access • Flexibility in mini-comp selection - Extensive guidance documents and templates to support the tender process - Mini-comp guidelines suggest 4 week process for tender 	<ul style="list-style-type: none"> • Less hands on support than other framework options • Greater responsibility on TBC procurement to support the tender process 	<ul style="list-style-type: none"> • Multi-Disciplinary Services • Project Management Services • Architectural Services • Cost Management Services • Civil and Structural • Engineering Services and • Environmental Services • Building Services Engineering and Environmental Services 	No Fee

	<ul style="list-style-type: none">-Central Government led framework and therefore no involvement with private organisation-Fully PCR 2015 compliant			
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Thursday, 17 March 2022

REPORT OF THE PORTFOLIO HOLDER FOR SKILLS, PLANNING, ECONOMY AND WASTE

ECONOMIC DEVELOPMENT SERVICE WORKPLAN 2022 - 2025

EXEMPT INFORMATION

None

PURPOSE

To define and agree a 3-year work plan, with associated resources that addresses key Council priorities, by delivering tourism and economic development focused activity, primarily in the town centre.

RECOMMENDATIONS

It is recommended that Cabinet:

1. Approves a financial contribution to support Staffordshire Destination Management Partnership (DMP) for financial year 2022/2023 with delegated authority given to the Assistant Director, Growth and Regeneration in consultation with the relevant portfolio holder(s) to make a decision on extending the contribution further on a year by year basis.
2. Approves all resource changes needed in order to deliver the activity defined in this report.
3. Approves the package of economic measures detailed in the report focusing on town centre businesses and the wider tourism based economy.
4. Approves the change of focus from the current start-up business grant to the town centre business grant for a 3 year period.

EXECUTIVE SUMMARY

The last two years have seen huge challenges for the local economy but also the potential for substantial opportunity. The COVID-19 pandemic, Brexit and resulting rapid changes in consumer behaviour have all significantly impacted on the economy, but the town centre, which was already in decline has struggled and is continuing to decline at an accelerated rate.

The significant success by the Council of attracting £21.65m of the Future High Street funding (FHSF) for a £40m programme, to structurally transform the town centre over the next three years plays a key factor in helping revive this economy. In addition to this programme, the Council also has plans to regenerate two further sites in the town centre, which will commence over the same period – Gungate and the Marmion House site.

These are important regeneration opportunities that have the potential to reinvent the town centre and create a place that people want to return to. In particular, the FHSF seeks to successfully reconnect the strong heritage and cultural offer with the town centre. This top down approach will galvanise town centre businesses into evolving, adapting and changing what they offer and how they deliver it, to fit in with a different town centre experience, whether that be education, leisure, culture, heritage or hospitality related.

To assist the town centre economy in making necessary adaptive changes there needs to be bottom up or grass roots support. As such, and after consultation with Cabinet Members it is proposed to focus resource by expanding the existing economic development (ED) team and

delivering on to two key work streams for the next three financial years, starting in April 2022 and up until the end of March 2025. The wider work of the team which includes regeneration, market operations, street trading and car parks will continue, but the primary focus for the economic development officers over this period will be:

1. Tourism and heritage development; and
2. Town centre business support programme

OPTIONS CONSIDERED

Deliver the Workplan

It is important to capitalise on the top down opportunities presented by the FHSF. It will be important to take existing businesses along with the FHSF proposals so that the town centre improves. The ED service work plan represents a coherent set of proposals that seek to provide support to businesses whilst also better understanding the tourism offer which can then be pro-actively supported at the local level. This tailored and cohesive approach provides a strong and robust way forwards.

Do nothing

The current structure of the ED team, which is set out in the resources section, has the capacity to deliver against projects but would require further resourcing to be able to fully deliver against the workplan.

The existing ED team would generate limited activity in terms of business support and not be able to manage the grant for town centre businesses, which would not contribute to the Councils objectives. Capacity would be severely stretched to deliver activity across the team due to emerging priorities and existing duties – see resources section.

Do not invest in external support and increase staffing resource

The Council could choose to continue as planned but not to externalise support for the tourism strategy or the business support programme, instead investing planned budget in additional internal resource. By not funding these activities, there would be £85k over the three years that could fund an additional officer. This amount of budget would cover a further Economic Development Assistant at grade E, for approximately 4 days a week over this period. Recruiting to a 3 year fixed post at 4 days a week represents a risk but there are likely to be people both internally and externally who this role who be attractive too.

The main risk of this approach however is lack of knowledge and skills to carry out the work required and the time needed to train the new employee and bring them up to speed. External support for both a Tourism Strategy and Business Support programme will pull upon existing knowledge and expertise gained in other areas. This would allow the Council to capitalise from previous work and implement tried and tested strategies, actions and delivery approaches, instead of having to invent them ourselves and learn as we go along. Correctly procured external support in both cases will enable the Council to deliver activity much quicker, realising outputs earlier and ensuring skills are transferred to existing team members.

Taking the approach of not investing in external support represents a significant risk that the proposed activity will not be delivered to it fullest potential and town centre businesses will not receive the support they ultimately need to adapt and thrive in a timely way.

RESOURCE IMPLICATIONS

Delivery

The Current Team

The ED team currently consists of four Officers as follows, supported by the Head of Service:

- 2 x Economic Development and Regeneration Officer, FT permanent.
- Skills Officer, 0.6 FTE, contracted until 31st March 2022.
- Economic Development Assistant – FT contracted until 31st March 2023.

The wider work of the team which includes regeneration, market operations, street trading and car parks will continue, but the primary focus for the economic development officers over this period will be: tourism and heritage development; and town centre business support

The existing work plan has no specific provision for town centre businesses and as such focuses on delivering activities across the wider economy. Tourism strategy and stakeholder engagement is also not currently a primary focus as recent priorities have been aimed at delivering one off physical projects in the town centre, such as visitor interpretation panels, wayfinding and heritage specific projects.

Tourism and heritage development

Tourism and heritage represents one of the most significant opportunities Tamworth town centre has to draw in new consumers and strengthen its reputation as a destination. With consumers now actively seeking out new things to do in their spare time there is now a need to clarify and consolidate what tourism means to the local economy and how it needs to adapt to meet current consumer expectations.

From April 2022 to the end of March 2025, the Council will deliver and achieve the following:

- Invest £15,000 per annum into the Staffordshire Destination Management Partnership (DMP). This commitment will be guaranteed for financial year (fy) 2022/2023. Dependent upon the successful delivery of agreed outputs a decision will be taken in quarter 4 of fy 2022/2023 and 2023/2024 whether to invest in the second and third year of this County Council led scheme.
- The key themes of the Council involvement with the DMP will be as follows (see appendix 1 for more detail);
 - Targeted marketing and campaigns to maximise Staffordshire's profile, and the respective contributor City/District and Boroughs, to attract more visitors.
 - Overseeing and commissioning research and intelligence to inform the activities of the visitor economy sector and to shape our offer and future priorities.
 - Lobbying and advocacy work to influence key policy makers to shape the direction of the sector and maximise Staffordshire's role and profile.
 - Business support activities and signposting to help the visitor economy renew and transform following on from the covid 19 pandemic.
- Allocate £40k to the development of a bespoke Borough – wide tourism strategy that will be implemented from April 2023. This will require external support and will be tendered for externally by the end of August 2022.
- Allocate an annual project budget of £10,000 (individual value of <£5k) that can be used for a variety of small projects. This money will be focused on town centre and tourism related projects.
- Allocate funding to provide additional staff resource for a further two years to ensure there is enough capacity for delivery.
- Proactively engage with relevant stakeholders, partners and businesses to ensure that activity delivered is appropriate, coordinated and supported.

- Identify and apply for relevant sources of funding that contribute to the objectives of the Tourism strategy.

Tamworth is currently known primarily as a tourism destination for Ventura Retail Park, Snowdome and Drayton Manor Park, which is just outside of the Borough boundaries. Nearby towns, cities and high profile destinations over shadow our offer such as the Castle. There is a key role post pandemic in presenting our offer to new and growing markets and visitors.

Town Centre Business support programme

Town centres across the country are facing significant challenges, but in Tamworth, these are primarily seen as the following:

Change in customer behaviour to online shopping; a customer focus on experience and quality rather than low value items; impact of social media on business and place reputation; quality of offer in competing areas; proximity and connections to Birmingham; cost of starting a business in a town centre; availability of property to the right quality; current offer does not to appeal to broad market; physical environment in the town centre.

There also a number of more strategic issues facing Tamworth as follows:

- **COVID-19 pandemic** – the pandemic had a significant impact on the high street and business to consumer businesses with a channel shift to online shopping having accelerated even faster than expected – many businesses need support to evolve to the new normal. The pandemic also represents a significant opportunity as many consumers are now seeking out a tourism and experience led offer, that Tamworth is uniquely placed to maximise.
- **Brexit** – whilst somewhat overshadowed by the impact of the pandemic, the impact of Brexit is only just being seen on the local economy. In particular changes to export and importing, availability of staff and a whole new business support regime – shared prosperity fund, are key work streams that will require investment by the team. Many of the council's current business support schemes are funded by Europe and expire in 2023 – significant work will be needed to contribute to new schemes under the Shared Prosperity Fund (SPF), that are due to be announced in Spring 2022.
- **Town Centre Regeneration** – the council will be delivering three large regeneration schemes across the town centre at different stages over the next 3 years, specifically FHSF, Gungate Masterplan site and Marmion House. Whilst the majority of the team is not directly involved in delivery, the ED team will be the first point of call for businesses who are nervous, don't understand what is being planned or want to take advantage of the opportunities presented.

To meet the challenges facing businesses in the town centre a package of economic support has been prepared. The package will consist of two elements to solely support town centre businesses, as defined by the boundary used for the Business Improvement District (BID);

- A business advice service
- A direct grants programme

In consultation with Cabinet it has been agreed that the high level objective of the overall business support programme will be:

- To attract and support new businesses to open in the Town Centre
- To encourage existing businesses to evolve, grow and adapt
- To encourage the diversification of business types in the town centre with a specific focus on food / hospitality and leisure / heritage.

Businesses not in the town centre will continue to be supported by the work of the ED team and strategic partners (e.g. Growth Hubs, Chambers of Commerce).

From April 2022 to the end of March 2025, the Council will deliver and achieve the following:

- Invest up to £15,000 per annum into an external provider to deliver a tailored business support programme for Town Centre businesses that are primarily independent with a consumer focus.
- The support programme will:
 - Improve peer to peer mentoring and networking opportunities
 - Help businesses fully understand their challenges
 - improve skills and knowledge
 - give businesses practical advice on the changes they need to make in order to adapt and thrive.
- Manage, administer and deliver a grants programme of up to £25,000 per annum into for town centre businesses. Linked to the business support programme, grants will support businesses who have an opportunity to grow and adapt to current and emerging opportunities.
- Deliver small one off projects (individual value of <£5k) that contribute to town centre businesses evolving and thriving, with a budget of £10k per annum.
- Allocate funding to provide additional staff resource for a further two years to ensure there is enough capacity for delivery.
- Proactively engage with relevant stakeholders, partners and businesses to ensure that activity delivered is appropriate, coordinated and supported.

1. Business Advice Service

Many town centre businesses tend to be small independents with limited resources and capacity that may struggle to make the adaptations they need to meet current consumer expectations and standards.

To support these businesses a specialist business support advisor will be tendered for externally. The successful contractor will be required to work seamlessly with the ED team to provide regular monitoring updates on the programme progress, insights into the business community and to support with recommendations for which businesses should go forward for the grant scheme. The tender will purposefully be left loose in terms of actual defined activity to ensure the Council benefits from the experience of potential suppliers to propose what has worked in other places. There will be a number of agreed high level outputs and outcomes that the contractor must meet to ensure the objectives of the Council are met and considered through service delivery, examples as follows:

- Numbers of businesses engaged with (marketing)
- Number of businesses supported (actual advice)
- Type of advice given
- Impact of advice

A set of performance indicators will be fully agreed and developed with the chosen supplier within the first 2 months of the contract and formally reported on, at a minimum, annually.

Due to the specific challenges facing town centre businesses, the ED team does not currently have the specific skills or knowledge required to deliver this service directly. The team is very small, with a broad focus on ensuring as many activities are delivered as feasible through a variety of means, focusing on third party stakeholder relationships and contract management approaches, as proposed.

An external organisation that specialises in this sort of delivery will have economies of scale, existing connections and examples of good practice and what works, allowing support to be

deployed more quickly to those businesses in need as well as being a cheaper option than direct staff employment. Working closely with the chosen supplier, the ED Team will be able to update their skills and knowledge in this area, ensuring opportunities for future delivery of town centre business support is sustainable and relevant.

2. Town centre business grant

The town centre business grant is designed to support Tamworth town centre businesses who will only be able to apply after receiving support through the business support programme, with priority being given to SME businesses in the food and hospitality / leisure and heritage sectors. This grant will replace the current start-up business grant, which will cease.

Grants will only be aimed at businesses that are classed as being a Small to Medium Enterprise, (SME, <250 employees) and are not part of a significant chain, national or multinational business. In very exceptional circumstances where significant positive impact on the town centre can be shown, grants may be considered out of scope, such as; high numbers of new additional jobs, new high profile chain that wouldn't invest without support, substantial secondary impact of investment in supply chain and other local businesses. A decision of this nature will only be made in consultation with the relevant portfolio holder.

There will be £75,000 allocated to grants over 3 years, with a nominal annual budget of £25,000. It is recognised that as the programme progresses take up and demand for grants may start off slow but increase, so it is important that at the end of each year financial year any underspend will be retained to ensure businesses can always benefit from the overall grant allocation across the 3 year period.

The grant aims to focus on the following broad areas to support the business adapt and grow. The more grant aims businesses can hit, the stronger the chance of approval, however it is not expected that businesses must meet every criteria:

- Training on subjects that benefit the operation of the businesses
- Skills
- Culture and behaviour to support the vision for the business, aspiration, strategy setting, business model, future planning, resilience, environmental sustainability.
- Innovation to evolve the business by way of new products, new services, new ways of working, technology.
- Enhancements to shop fronts and trading spaces

The business will be required to demonstrate within their application / business plan how the proposed project and a successful grant award will lead to either:

- More revenue
- Better reputation / image for their business and the town centre.
- Improved staff skills
- Clearer objectives for the business to grow and adapt

The grant process is based upon on the existing start-up business grant scheme and would be administered internally by the ED team with support from the business advisors contracted to deliver the business support programme. The role of the external business advisors would be as follows:

- To refer businesses to apply for the grant
- Ensure the business has received adequate support and guidance to enhance their business operations,
- Provide feedback to the ED team to support with decision making on applications.

The final decision on applications will remain with the ED team who will put forward recommendations to members through the nominations and grants committee, allowing the business advisors to remain impartial and continue to work with the business ensuring fair decisions without prejudice. The business advisors would also be required to work with the business post successful application ensuring all projects are successfully delivered as approved, with outputs realised.

The ED team will work with the business support provider to ensure the grants scheme meet business need. In year one – financial year 2022 / 2023, the grant scheme will start from quarter 3 to ensure there is enough time for marketing and the business advisor service to assess demand and need.

From quarter 3 2022/2023 on the grant scheme will be ran quarterly in line with nominations and grants committee meetings. Grants will be awarded from a minimum of £2500 to a maximum of £10,000 per businesses, unless there is exceptional reason to make a larger grant.

As the grant scheme evolves and demand comes forward for businesses these forms may need to be adapted. Any changes will be made in consultation with the relevant Portfolio holder.

Finances

Proposed budget structure – April 2022 to end March 2025

In order to deliver the activities proposed over a 3 year period the following new revenue budget structure is proposed, to be created under a new cost centre.

	2022 / 2023	2023 / 2024	2024 / 2025	TOTAL
00101 - SALARIES – Grade E, scp 22 incl car allowance of £1239 p/a	£ -	£ 37,879	£ 38,926	£ 76,805
32056 - STAFFS DMP	£ 15,000.00	£ 15,000.00	£ 15,000.00	£ 45,000.00
34553 - TOURISM PRODUCT DEVELOPMENT	£ 40,000.00	£ -	£ -	£ 40,000.00
35087 - TOWN CENTRE STRATEGY	£ 10,000.00	£ 10,000.00	£ 10,000.00	£ 30,000.00
35223 - BUSINESS SUPPORT	£ 15,000.00	£ 15,000.00	£ 15,000.00	£ 45,000.00
34537 - GRANTS	£ 25,000.00	£ 25,000.00	£ 25,000.00	£ 75,000.00
TOTAL	£ 105,000.00	£ 102,879	£ 103,926	£ 311,805

It should be noted due to the fluid nature of the work in this field it is likely that in some years not all budgets will be committed, yet may be needed as demand arises or is created in future years. Therefore all budget underspend on this cost centre should be retained at the end of each financial year, until the March 2025 where it shall be returned to balances or subject to further approval, used for other Town Centre related activity.

Current and planned budgets re-profiling / retention

The following funds and budgets are currently either retained or existing planned budgets under the responsibility of the Economic Development and Regeneration service, They are allocated primarily for town centre and tourism activity. It is proposed that all of these budgets should be used to fund the new structure as detailed above.

The total available budget over 3 years will be: **£311,805**

Town centre strategy retained fund – PM1518

There is currently a retained fund of **£62,289** allocated for Town Centre Strategy projects, with £64,926 to be added to this retained fund from the Reopening high streets safely fund. There is also £47,000 worth of grant funding to be claimed back from the welcome back fund and transferred back to the town centre retained fund. This money has been used over the past two years to specifically fund Town Centre projects but also government programmes focused on the impact of the pandemic, such as the Reopening High Streets Safely fund (RHSS) and the more recent Welcome Back Fund (WBF) – each to the maximum spend value of £67,455. The nature of the government funds meant the Council had to spend its own money and is now successfully claiming this back in arrears, hence the large retained fund now present. This fund was initially set up to support wider Town Centre project delivery but success with other funding applications such as Future High Streets Fund and Cultural Recovery Fund have limited the need for this budget. This budget should continue to be retained and amalgamated into the new budget structure.

This will total **£174,215.**

£12,590 from GS0402 32050 – Consultancy fees to be retained at end of 2021/22.

Town Centre strategy – annual budget – GS0402 35087

Aligned to the retained fund mentioned above is an operational budget of £22,000 per annum for financial years 2022/2023 and 2023/2024. This budget also includes a virement from GS0404 conservation grants for another two years, that will continue as agreed. This budget should be removed from GS0402 and amalgamated into the new budget structure.

This will total **£44,000.**

Small Business grants – annual budget – GS0402 34537

Up until the end of March 2023 there is an allocated budget of £20,000 in GS0402 34537 towards Small Business Grants.

The Voluntary and Community sector budget, GS1002 57025, funds the small business grants via a virement on a rolling basis and is reviewed and approved through cabinet every 3 years. It has been agreed with the current budget holder, Assistant Director Partnerships, that this budget will be permanently moved to the Economic Development service from April 2023.

The annual budget of £20,000 for each financial year starting in April 2022 up until the end of March 2025 should be removed from GS0402 and amalgamated into the new budget structure.

Proposed activity from April 2025 will be taken to Cabinet in quarter 4 of financial year 2024/2025 for approval.

As a result of the pandemic there appears to be a caution in starting a business and becoming self-employed due to the lack of financial support which was available for early stage businesses during lockdown periods. Added to this is the fact that the job market is highly competitive at the moment, with a high number of job vacancies being promoted across a number of sectors. This has seen a reduced number of applications being submitted into the current Start Up Business grant scheme for the financial year 2021/22 which is now not deemed fit for purpose.

During the first and second quarter of 2021/22, only 6 applications (3 each quarter) were received evidencing a declining demand for the scheme. Pre pandemic, quarterly applications averaged between 7 – 10. The businesses applying for the grant scheme have been varied, the 6 businesses supported this year have been an accountant, a vehicle transporter, a shop premises within the town centre supplying health food supplements and cosmetics, a hair and beauty supplies supplier, a mobile beauty therapist and a dog groomer.

Since starting the Start-up grant schemes, other publically funded grants have come to market, through European funding that start-up businesses in Tamworth can access. It is also likely that the shared prosperity fund, due to be launched in 2022 will have opportunities for this type of activity.

Based on the above, it is felt that refocusing the grants to Town Centre businesses will create a bigger impact to the local economy than continuing to focus on small start-ups businesses.

This will total £60,000.

Salary underspend – Fy 2021 / 2022

There is a current in year underspend on salaries in GS0402 00101 of £21,000. This is due to a number of factors but is primarily based upon the fact a Regeneration Officer was seconded to a new role supporting delivery of the FHSF programme from April 2021. Their replacement was not recruited until September 2021. This underspend should be retained and amalgamated into the new budget structure.

This will total £21,000

Staffing implications

There are currently 3 posts on the establishment that form the ED Team, that will deliver the activity outlined in this report. The ED team forms part of the wider economic development and regeneration Service and are supported at a strategic level by the Head of Economic Development and Regeneration.

- 2 x permanent, full time, Economic Development and Regeneration Officers – grade F
- 1 x fixed term (until March 2023), full time, Economic Development Assistant – grade E

The job descriptions of the 3 officers who will be involved in the project have been reviewed and do not need any amendments, as they are consistent with the activity proposed. It should be noted that all officers have roles and responsibilities above and beyond the activity proposed. As outlined earlier in this report the wider service is facing unprecedented external challenges that have increased demand and the need for public sector led support including engagement with the wider economy.

The ED team, have the following significant work streams over the next three years which includes the package of measures described in the above sections.

- Contract management, engagement and delivery with Staffs DMP.
- Commissioning, coordination and delivery of a Tourism Strategy
- Delivery of actions and projects resulting from Tourism strategy
- Stakeholder engagement and management with Tourism partners and economy.
- Town Centre and Heritage related project delivery – e.g. interpretation boards, digital marketing, wayfinding.
- Commissioning, coordination, contract management and delivery of a Town Centre business support package.
- Delivery and monitoring of a Town Centre business grants process
- Design, commission and deliver an economic baseline review for the reset and recovery programme.
- Monitor and research useful economic and town centre data producing regular reports to input into other services and regeneration programmes / funding bids.
- Lead day to day engagement with Town Centre businesses on Future High street Fund

- Design, delivery and commissioning of business support schemes, both internally and with partners.
- Engage with stakeholders involved in wider business support – LEPS, Growth Hubs, LA's, central Government
- Deliver activities that contribute towards inward investment and wider place promotion.
- Act as a gateway for local business support and advice, signposting to relevant support.
- Identify and apply for relevant funding to deliver projects in line with the objectives of the service – Shared Prosperity Fund, Regional Investment Fund, cultural recovery fund, Heritage Funds, Local Government Association.
- Contract management, monitoring and delivery of existing European Regional development Fund projects.
- Monitor and keep up to date on local activity on employment and skills.

In order to have enough capacity to meet these work streams and deliver the proposed economic measures to support the town centre economy, it is proposed to extend the role of Economic Development Assistant by two years up until the end of March 2025, subject to the approval of a HR business case which will be submitted April 2022. This will allow the ED team enough capacity and resilience to deliver the objectives set. A job profile for the Economic Development Assistant can be found at appendix 2.

In terms of roles and duties, one Economic and Regeneration Officer will focus primarily on tourism and heritage development, the other will focus primarily on town centre business support, though it is expected both will have a strong understanding of each work stream for resilience. The ED Assistant will support both officers in delivering each priority, providing necessary capacity with the increased workload.

Legal/Risk Implications Background

There is a risk that the services delivered to businesses through all of the approaches outlined in this report, do not meet the needs of businesses. All methods delivery will be reviewed on a regular basis with relevant performance targets set and appropriate reporting to relevant committees and council governance structures. Where issues are identified, immediate changes will be made to improve service delivery and ensure businesses receive the support they need and the overall objectives of the work plan are being met.

Equalities Implications

The package of support detailed in this report focuses on defined sectors of the economy, specifically SME's physically based in the town centre and tourism focused businesses based across the Borough. Businesses outside of the defined priorities will not be eligible for this support. The ED team will continue to support and signpost advice for all businesses across the Borough Council area and actively work with partners and stakeholders to develop new business support schemes targeted at other parts of the economy.

Environment and Sustainability Implications (including climate change)

There are no direct environment and sustainability implications arising from this report, but it is likely that the advice and support accessed by businesses across targeted sectors, could result in changes that improve business practices for the better: energy saving advice; product redesign; packaging advice; digitisation of services away from paper.

Background Information

None.

Report Author

Matthew Fletcher – Head of Economic Development and Regeneration

List of Background Papers

- Town centre – Cabinet report - 08.11.2018
- Town centre work streams – Corporate Scrutiny - 08.12.2019
- Start up business grant review – Cabinet Report - 06.02.2020

- Reopening High Streets Safely fund – Scheme of Delegation 24.09.2020
- Welcome Back Fund – Cabinet 08.07.2021

Appendices

1. SCC request for DMP support
2. Economic Development Assistant Job Profile

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Our Ref: AH/DMP

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Date: 3rd August 2021

Destination Staffordshire
Staffordshire County Council
2 Staffordshire Place, Tipping Street,
Stafford, Staffordshire ST16 2DH

By e mail to all Directors of Staffordshire and Stoke-on-Trent Local Authorities

Dear Colleagues

Re: Staffordshire Destination Management Partnership – Enhanced Offering

You will recall that in late June 2021, the Chair of the Destination Management Partnership (Councillor Philip White) wrote to Leaders of all District and Borough Councils and City of Stoke-on-Trent Council.

Following on from that letter, a meeting of the Staffordshire Economic Growth District Directors on 2nd July and the DMP Board meeting on 26th July it was agreed to prepare a brief note setting out some of the proposed enhancements and their potential benefits both in providing a collective Staffordshire identity and setting out a compelling locally distinctive offer.

In essence rebooting the DMP with full contributions from Boroughs, Districts and the City Council, equating to £15k each will help us to promote Staffordshire together, mutually benefitting from increased volume and value of tourism activity and I am most grateful for those partners who have been able to confirm their contributions so far.

Given the nature of the proposed investment it is difficult to accurately predict a set of ‘key performance indicators’ against which progress or success could be managed. It is also important to realise it will take some time for us to be able to quantify the impact of the benefits of investment decisions that we are making now.

By developing our enhanced approach to two tier working, we will give you the opportunity to shape and set the parameters and measures of success in a manner that best reflects your local priorities.

We are sure you will appreciate that the key initial focus should therefore be seen as one of enhanced collaboration and joint working to repay and maximise investment and ultimately generating further market penetration for our visitor economy and its businesses.

Our proposals were based around 4 key themes and 2 enablers, and we set out below how there are being progressed along with future planned activity from the proposed increased levels of investment.

Staffordshire County Council has already earmarked an additional investment of £200,000 into these activities and of course, the success and future development and growth of these activities will be dependent on our collective investment and efforts to promote Staffordshire as a great place to live, visit and enjoy.

Key themes:

- **Targeted marketing and campaigns** to maximise Staffordshire's profile, and the respective contributor City/District and Boroughs, to attract more visitors.
 - a. The launch of the 'feel free' campaign as endorsed through the DMP Board meeting in March 2021. Circa £150,000 marketing budget for enhanced destination marketing through to Spring 2022. Greater integration and input with local campaigns.
 - b. Initial Social Media Digital Spring campaign led to 13 million impressions, 400,000 views and 2.79% click through rate (above travel industry averages). There may be an opportunity to provide further break down and analysis to understand key areas of activity.
 - c. Development of the Staffordshire Destination Video (which can be tailored to seasonal activities and has longevity beyond the current season) and associated paid for advertising, including Sky AdSmart TV through to Spring 2022.
 - d. Through digital platforms alone, the Summer campaign has an estimated reach of 48 million impressions.
 - e. Opportunity to use the 'Feel Free' campaign material and associated photography and videography for tailored and locally distinctive marketing.
 - f. Tailored web content for the specific 'destination' pages on the Enjoy Staffordshire website, allowing for locally preferred marketing messages and links to locally specified websites and social media platforms.
- **Overseeing and commissioning research and intelligence** to inform the activities of the visitor economy sector and to shape our offer and future priorities.
 - a. Commissioning of a new DMP visitor economy strategy. Contributing partners will be able to influence with the specification for tender, procurement exercise and appointment of consultants. Contributing partners and businesses will have a key role in inputting to the strategy.
 - b. Contributing partners to collectively agree the research programme and what is required now and over the next 3 years that would benefit all partners. What, where, when, who?

- c. Economic impact of tourism research at local authority level and county wide level to be provided for contributing partners. The value of the Staffordshire visitor economy in 2019 was valued at £1.87 billion with 28 million visitors and 32,000 jobs in the wider sector. Working in collaboration we will look to commission the most effective research to understand how the volume and value of our visitor economy is performing.
- **Lobbying and advocacy work** to influence key policy makers to shape the direction of the sector and maximise Staffordshire's role and profile.
 - a. The appointment of a Visitor Economy Partnership Development Manager to act as an advocate for the sector and establish future revenue opportunities
 - b. As identified above, the future direction of the Staffordshire visitor economy will be shaped by the visitor economy strategy and the collaborative approach to its production.
 - c. Using appropriate formal and informal relationships and networks to push the Staffordshire message , embracing those local authority partners that participate, and reiterating local distinctiveness.
- **Business support activities and signposting** to help the visitor economy renew and transform following on from the Covid 19 pandemic.
 - a. Targeted Business to Business Membership campaign running during Spring 2021 to promote new membership
 - b. Encouraging all district / borough / city tourism businesses to take advantage of the current free membership opportunity and basic listing on the Enjoy Staffordshire website. Partner funding has and will enable this so that the associated businesses can benefit directly from the resources and support available.
 - c. Relaunch of the Staffordshire Tourism & Good Food Awards to recognise and reward excellent businesses in the tourism, hospitality and leisure sector and provide a mechanism for them to compete on the national stage.

Enablers:

- **Enhanced two tier working between District and Borough Councils, Stoke-on-Trent City Council and Staffordshire County Council**, creating greater connectivity between Staffordshire wide and local issues and delivery mechanisms.

- a. we have asked for nominations from partners to join our Stakeholder Working Group which will provide the key officer level direction to shape and truly deliver on the above proposals.
 - b. The Assistant Director for Business and Enterprise will lead on the Stakeholder Working Group until the appointment of the Visitor Economy Partnership Development Manager.
 - c. There are likely to be significant opportunities for economies of scale through joint procurement and other joint working targeted towards the needs of the sector.
- **Utilising the Staffordshire story and place brand resources**, Enjoy Staffordshire assets and established channels to promote and grow the Staffordshire visitor economy and bringing the story to life through compelling examples.
 - a. The successful launch and development of the Staffordshire Story and associated resources is already raising profile and creating substantial new opportunities including through the Ambassadors network. Working through the Stakeholder group, there is an opportunity to engage, shape and benefit from the Staffordshire story for respective localities.

I do hope that the above provides you with an indication of the key priorities that we are proposing to launch. I would however like to make one final plea. We do understand the pressures and challenges we all face to deliver our respectively demanding and yet always rewarding key priorities. If we are truly to maximise the benefit of the tourism, hospitality, and leisure sectors to our respective areas, we do need engagement from key officers. We cannot simply operate a “pay and the DMP will deliver” approach. You know your areas and programmes in detail, and we need to capture that and represent it at a DMP level. Collaboration, partnership, and communication is a key component of this reboot to help us maximise the benefits from this investment.

We very much hope and look forward to your organisation joining us in this exciting journey to really kick start the Staffordshire visitor economy.

Yours sincerely



Anthony Hodge
Assistant Director for Business and Enterprise, Staffordshire County Council

JOB PROFILE ECONOMIC DEVELOPMENT ASSISTANT	GRADE: E (March 2021)
<p>Job Purpose</p> <ul style="list-style-type: none"> • Reporting to an Economic Development and Regeneration Officer, support the delivery of the aims and objectives of Tamworth Borough Council and the Growth and Regeneration Service Business Plan. • To assist the development and implementation of Tamworth’s Economic Development and Regeneration strategies, projects and policies with particular emphasis around the themes of business engagement, enterprise, business support, inward investment, skills and marketing and promotion. 	<p>Experience</p> <ul style="list-style-type: none"> • Experience of working in one of the following: economic development, tourism, town centre management, business support, inward investment, regeneration strategy, regeneration delivery; town planning; local government; partnership working. • Experience in successful project delivery and communicating with businesses. • Experience in contacting and advising businesses. • Experience of processing business related data and information. • Experience of public sector grants processes • Experience of dealing with multiple external stakeholders.
<p>Functional Responsibilities</p> <ul style="list-style-type: none"> • To support the development and delivery of relevant strategies and delivery/action plans associated with economic growth and regeneration with particular emphasis on business support and place investment. • To support activity with and by other Council Services and external partners that leads to coordination of activities that results in better outcomes for the local economy. • To actively engage with local businesses, relevant organisations, groups and individuals and develop effective collaborative partnerships. • To support the development and delivery of business support programmes for commercial businesses in all stages of growth. • In response to business enquiries provide advice and signpost to other organisations and sources of information. • Working with others, develop and implement marketing and communication strategies including websites and social media to promote start up, enterprise, growth and inward investment. • Work with internal council services, other agencies and businesses to develop, implement and promote projects. • To support Council led grants processes focused on supporting the economy. • To support the development and delivery of commissions that increase the Councils knowledge and understanding of the local economy. • Conduct annual benchmarking activities and any other required business consultation assisting in the production of reports where applicable. • Support funding bid submissions for projects under local, regional and national funding schemes and financially manage any successful bids where appropriate in liaison with the Economic Development and Regeneration Manager. 	<p>Knowledge, Skills and Abilities</p> <ul style="list-style-type: none"> • Knowledge of Economic Development and Regeneration practices, legislation and policy • Knowledge of national / regional / local organisations involved in economic development and regeneration • Awareness of business development needs and methods of business engagement • Knowledge of relevant IT systems and software • Ability to use a variety of presentation and display equipment, Keyboard and IT software and systems • Ability to use social media and basic knowledge of website content editing. • Ability to interpret data; high-level literacy and numeracy; good report writing and presentation skills. • Ability to support and contribute effectively at meetings. • Developed influencing and negotiating skills. • Articulate and able to assimilate and impart information on a range of issues, using own initiative • Ability to understand the needs of businesses, partners and stakeholders • Ability to keep accurate records according to agreed systems • Strong listening skills • Ability to interact with people at a variety of levels and settings, including negotiating skills. • Excellent organisational and interpersonal skills • Consistent attention to detail • Ability to work on own initiative, operate effectively as a team member and work in partnership with other officers from the Council and external organisations

<ul style="list-style-type: none"> • Contribute to the implementation of specific initiatives to improve and develop the local economy. • Undertake all corporate requirements on health & safety, equal opportunities, data protection, safeguarding, risk management and financial regulations • Represent the council at external meetings as required • Deputise for the Economic Development and Regeneration Manager as required. <p>Activity:</p> <ul style="list-style-type: none"> • Prepare project briefs and seek good practice from other similar areas of work. • Support the development and delivery of strategies for the economic development and regeneration of the Borough • Monitor and report on key economic data that will support decision-making. • Support the devliery programmes and action plans in respect of economic development and regeneration • Provision of Business support • Undertake Business engagement <p>Promotion and development of new and existing businesses and a skilled workforce</p> <p>Research and data analysis into the local economy and its dissemination to internal and external customers</p> <p>Supporting the role of town centre regeneration including contributing to the operation of Tamworth Enterprise Centre, entre, Tamworth market, off street car parking and street trading if required.</p>	<ul style="list-style-type: none"> • Full driving licence – this post attracts an Essential Car User Allowance
<p>Strategy/Policy Development</p> <ul style="list-style-type: none"> • Support the development of : <ul style="list-style-type: none"> ○ Economic Strategy ○ Inward Investment Strategy ○ Town Centre Strategy 	<p>Attributes</p> <ul style="list-style-type: none"> • Self-reliant, initiator, motivator finisher. • Personal credibility with a high degree of integrity
<p>Additional Duties Not applicable</p>	
<p>Other</p> <ul style="list-style-type: none"> • Any other reasonable duties commensurate with the grade and general nature of the post. 	

Thursday, 17 March 2022

Report of the Portfolio Holder for Homelessness Prevention and Social Housing

Council Housing Rent Accreditation

Exempt Information

None

Purpose

1. To outline Housing Quality Network's (HQN) `Maximising Income and Sustaining Tenancies` (MIST) Accreditation Award to Tamworth Borough Council, including the assessment process and findings report.
2. To update Cabinet on Tamworth Borough Council's `Maximising Income and Sustaining Tenancies, 3 Year Improvement Action Plan 2022 – 2025`.

Recommendations

Cabinet are recommended to:

1. Acknowledge the independent assessment resulting in the Re-Accreditation of the Councils council housing rent and tenancy sustainment services.
Appendix D: Assessment Report.
2. Approve the Council's Maximising Income and Sustaining Tenancies, 3 Year Improvement Action Plan 2022 – 2025`. **Appendix A: Action Plan.**

Executive Summary

Maximising rental income directly supports the Councils Vision, ***Tamworth - celebrating our heritage, creating a better future***. Tackling the causes of poverty and financial hardship, and ensuring a *one council* approach to the management of debt is central to the Councils core purpose around ensuring sustainable and resilient communities.

The Council has a corporate project around welfare reform which includes the management of council income streams; and collection of council housing rents is a significant part of this, led by the Neighbourhoods Team. During the Pandemic the Department Levelling Up Communities and Housing issued a raft of guidance and support to people facing financial hardship. This has included things like

- Repeated guidance on renting and arrears management

- Moratorium on possession proceedings for periods to support COVID related restrictions
- Introduction of schemes such as Breathing Space
- Financial support including £20 per week uplift to Universal credit, furlough scheme, £500 test and trace support payment, Household Fund for food and essential supplies

Despite the pressures from the Pandemic Income continues to be maximised and current arrears performance continues to compare well when benchmarked. This is annually reported to Cabinet as part of the tenants' annual report.

The table below shows performance trends, over the past four years, against recognised key performance indicators.

Indicator	2017/18	2018/19	2019/20	2020/21
% of rent collected (incl arrears b/f)	101%	101.14%	101.92%	101.57%
% of rent collected (excl arrears b/f)	103%	103.33%	104.77%	104.42%
Total rent collected (£)	£17.699m	£17.527m	£17.672m	£18.094m
Current arrears as % of debit	2.45%	2.82%	2.87%	2.66%
Current arrears value £	£434k	£494k	£507k	£481k
(Former tenant arrears) FTA value £	£633k	£685k	£699k	£720k
Total debt only £	£1.07m	£1.18m	£1.21m	£1.20m
FTA collected £	£36,547	£54,084	£80,169	£90,917
FTA collected %	5.77%	7.89%	11.47%	12.63%
FTA as % of debit	3.57%	3.90%	3.95%	3.98%
Value of rent written off	£42,176	£25,260	£57,249	£51,849
Evictions for rent arrears (number)	18	13	9	0

Note: The figures detailed above only refer to current and former rent arrears, they do not include any other debts i.e. current and former garage arrears, court costs and repair recharges etc. The overall total debt outstanding will therefore be higher than the rent arrears figures detailed above and are reported on separately by the Council's finance team.

Part of the Housing Rent tenancy sustainment service has always sought to benchmark and learn from best practice. Concurrent to this work, the Council is also undertaking a self-assessment of its Council housing services around consumer and economic compliance – having a robust and comprehensive approach to income management will be important for that.

Previously the rent accreditation process has routinely included an annual external review from Housing Quality Network, with a three-yearly full assessment identifying strengths and areas for improvement so the Council can continue to evidence high

quality services including supporting those most vulnerable in the councils housing stock. As a result of this process the councils housing income services continues to be externally accredited; and the improvement plan updated with latest findings. Progress on the last action plan is available on request.

Between November and December 2021, the Council underwent this anticipated and full housing rent/income assessment. As a result of that process, which in itself is externally moderated by an independent panel, Tamworth were awarded a further 3 years accreditation based on its continued delivery of high quality services across its full range of services, evidenced through partner and stakeholder feedback to the inspectors. (December 2021-December 2024) The award notification and certificates are shown at **Appendix B: Award Letter. Appendix C: Certificate**

Independent Panel Approach

Feedback from the review follows usual conventions, namely to set out areas identified as positive practice, key organisational strengths and areas for improvement which then inform recommendations for the Councils improvement plan. These are summarised below.

Areas of Positive Practice

Set out below as just a few of the positive comments the Council received from the Independent & Accreditation Panel;

- *“They appear to strike to right balance between support and enforcement, with good examples of supportive case management.”*
- *“They clearly care a great deal about their tenants’ wellbeing and sustaining their tenancies”.*
- *“The support on offer for Tamworth’s residents is excellent and the Accreditation Report shows strong links with Citizens Advice and the DWP and good joint working with other teams within the Council in order to provide a well-rounded offer of support to residents.”*

Strengths Identified

Tamworth Borough Council demonstrates;

- ✓ service strengths in all six rent accreditation standards modules
- ✓ a strong offer to support residents’ financial well-being including where there are multiple tenancy and debt issues including, early intervention/prevention, budgeting and benefit advice
- ✓ a strong performer on rent collection and arrears management, with the collection rate and arrears likely to be in the top quartile compared with HouseMark benchmarking data
- ✓ has clear strategic, policy and performance framework that is reflective of best practice, with an explicit focus on tenancy sustainment, looking to avoid legal action unless necessary
- ✓ confidence levels regarding the shape and direction of the service
- ✓ no material weaknesses in rent income management

Areas for Improvement

Inevitably, and as part of the process, HQN have identified areas for improvement which have been integrated into the improvement plan for approval. These were well received and support Officers own assessment of opportunities for continual improvement.

Below is a summary of the key areas for improvements;

- | |
|--|
| <ol style="list-style-type: none"> 1. policy framework including document control to be strengthened 2. measurement of customer satisfaction with service with the findings shaping future delivery 3. the monitoring of service demand to ensure that appropriate staffing resources are available and allocated efficiently 4. tenant involvement and participation, possibly through the Council's wider community engagement initiatives 5. the digital offer, in line with the digital inclusion strategy continue to explore and develop the digital service offer 6. pre-tenancy work, supporting and assisting tenants from start of tenancy 7. sustained performance focus on former tenancy rent arrears recovery 8. Take up of direct debt payment, through promotion of the ease and benefits of this payment type |
|--|

The action plan has been developed by the Council's Neighbourhood Income Team together with the Tenants Consultative Group, which incorporates all of HQN's recommendations outlined in their assessment report.

The Tenants consultative group continue to be involved with the development of this service critical action plan, During the last tenant meeting in January 2022, tenants agreed the action plan is fundamental to ensuring tenants continue to receive all the right support, information and advice they need to pay their rent on time and minimise debt.

Progress and monitoring of the action plan will be reported to;

- ✓ Members via Pentana Project Highlight Report
- ✓ Senior Management and Officers via monthly performance meetings and where relevant on the council housing live dashboard on the web
- ✓ Tenants via tenant consultative groups
- ✓ Discussed with the Portfolio Holder and when relevant via the Homelessness Prevention and Social Housing sub committee

Financial Implications

There are no direct financial implications arising from this report.

Delivery Timetable

Tenants Group involvement with the drafting of the 3 Year Action Plan	January 2022 & March 2022
Communication Plan: <ul style="list-style-type: none"> • Website update • Open House 	January 2022 – April 2022

<ul style="list-style-type: none"> • Press Release – all council approved social media platforms, via communications team • HQN website & press release • Strap line on rent letters • Internal briefings / newsletters 	
Implement 3 Year Action plan	March 2022 – end March 2025
Monthly Monitor & Review Progress of Action Plan via <ul style="list-style-type: none"> • TCG & Neighbourhoods Performance monitoring framework 	Ongoing March 2022 – end March 2025

Report Author

Lee Birch – Head of Housing Management & Neighbourhood Resilience
 Leanne Lea – Housing Manager

Background Papers Appendices

Appendix A – Accreditation award letter
 Appendix B – Accreditation award certificate
 Appendix C – Accreditation assessment report
 Appendix D – Accreditation 3 Year Action Plan 2022-2025

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Accredit: MIST Maximising income; sustaining tenancies Accreditation assessment Action Plan 2022/23 and 2023/2024

Project Team - Lee Birch, Leanne Lea, Julie Clempson David Turner, Steph Norton,

Following the assessment, HQN's assessor considered that service strengths outweighed weaknesses in all six modules and recommended that TBC was awarded accreditation.

The assessment of TBC's service against each module is summarised

Module	Assessment
Customers and communities	TBC demonstrates a clear customer focus, is responsive to local priorities and is continuously developing effective partnerships with other agencies to design and deliver services. This includes advice and support to establish and sustain successful tenancies. However, there has not been a customer satisfaction survey for some time. There is also scope to expand the opportunities for involvement in the service.
Income collection	TBC demonstrates an efficient collection and accounting of rent, service charges and other housing-related income. TBC sets rents in line with government guidelines and customer feedback appears positive regarding the perceived value for money for rent.
Arrears management	TBC demonstrates effective measures to prevent and recover current tenant debt. We found the case management to be swift, effective and supportive. TBC's focus on tenancy sustainment is clear. There is scope for some further improvements to the pre-tenancy process to prevent arrears. There is also a need to re-establish a focus on the prevention and recovery of former tenant arrears (FTA).
Welfare reform	TBC demonstrates effective administration/management of rent accounts where HB or UC are being claimed, has positive partnerships with welfare benefit providers and expert advice and support is available in-house and through external partners.

Financial well-being	TBC, demonstrates effective measures to address financial exclusion and enhance financial well-being in the community, including helping customers to maximise their income through money management and welfare benefit advice available through Citizens Advice, Tamworth Advice Centre and a host of other partners.
Value for money	TBC applies a robust, strategic focus on achieving effectiveness, efficiency and economy of services. Performance and costs appear to be managed effectively, with comparatively high performance and comparatively low costs. There is a need to strengthen FTA performance.

Action Plan 2022-2023 and 2023-2024

Recommendation/ Discussed	Actions	Responsible Officer(s)	Completion Date
1. Review HQN's income management toolkits periodically, as self-assessment tools to continue to identify further service enhancements	<ul style="list-style-type: none"> Visit training courses, HQN's self-assessment toolkits and positive practice examples as part of continuous service improvement Develop a two-year training programme for staff utilising the above and free training as part of the Citizens Advice Mid Mercia contract. Record all service improvements/achievements as part of day-to-day work practices and publish key achievements through customer publications - Open House/Annual Report to tenants Review customer feedback through a wide range of communication mechanisms i.e. Tell Us, satisfaction monitoring, STAR, bi-annual rent and arrears survey, day-to-day case management 	Leanne Lea	March 2023
		Julie Clempson	April/May 2022
		Tenancy Sustainment Officers	Ongoing
			Ongoing
2. Update the policy framework, including document control to show ownership and review arrangements.	<ul style="list-style-type: none"> A Data Control Master Sheet to be incorporated into all new and revised Policies to Include document title, version, project leads, service area, tenant approved date and SOD/Cabinet approved date – complete 	Leanne Lea	Completed February 2022

This was in hand as we concluded our assessment	<ul style="list-style-type: none"> • A Master spreadsheet to be set up to include a detailed suite of all policies and procedures across Neighbourhood Services which will reflect the Document Control sheet information • The above spreadsheet to be updated by all Neighbourhood Managers in accordance with any policy/procedure update 	Leanne Lea	March 2022
3. Complete the planned self-assessment against the Regulator's updated Consumer Standards and the broader requirements of the Social Housing Charter	<ul style="list-style-type: none"> • Self-Assessment of Landlord compliance with regulatory consumer standards to include performance on headline areas, compliance with national standards and benchmarking i.e. HouseMark etc. • Consult with customers to define a set of SMART service standards for income management as part of the 'Local Offer' review across Neighbourhoods • Publish clear service standards and monitor/report for compliance – Pentana, Open House, Tenants Annual Report etc. 	Lee Birch Leanne Lea Julie Clempson Neighbourhood Management Team to feed into the corporate Project	March 2023
4. Linked to the above recommendation, whilst resident satisfaction appears high, there has not been a satisfaction survey for some time. We recommend that this is carried out to gather customers' formal and informal views regarding TBC's income management and tenancy sustainment offer	<ul style="list-style-type: none"> • A Rent and Arrears Survey was conducted in Sept 2021, the results of which was being concluded at the time of the accreditation assessment • The results of which will be analysed and will inform service development • The above is a bi-annual survey and will next be undertaken in Sept 2023, results to be shared with the Management Performance team • The results of the next STAR Survey will be analysed in respect of tenants perception that rent provides value for money 	Leanne Lea Julie Clempson Steph Norton David Turner	Sept 2021 April/May 2022 Sept 2023 2023/2024
5. The October 2020 audit report cited ongoing budget pressures and constraints. In this context, it is critical	<ul style="list-style-type: none"> • Undertake Bi-annual Impact Assessment, consider findings and incorporate into service improvement/work plan 	Julie Clempson Leanne Lea	Oct/Nov 2023 Ongoing

<p>that TBC continues to monitor service demand to ensure that appropriate resources are available and allocated efficiently. This includes the income management service and the wider provision of financial inclusion advice and support</p>	<ul style="list-style-type: none"> • Ensure Supplementary support for the team on specific key projects. • Contribute to the corporate current Financial Inclusion Policy with input from customers regarding priorities and service standards and include top level action plans that link to more detailed service improvement plans 		
<p>6. To expand slightly on the above recommendation, as more customers migrate to UC, arrears case management is often more complex and calls more time-consuming. We recommend that TBC avoids the income management service becoming too “lean,” which could impact on performance, service delivery and create higher direct and indirect costs to the authority</p>	<ul style="list-style-type: none"> • Continue to provide comprehensive administration support to the team • Commission external support to include legal and technical expertise, to map and support on key priority projects • Advertise more widely for future vacancies to ensure a quick turnaround for forthcoming vacant posts • Explore the potential for introducing modern apprenticeships within the income team • Provide training as identified to ensure resources are targeted efficiently and continual improved case management • Actively promote the My Housing Portal through the website and all Income and other Neighbourhood communication to encourage customer self-reliance 	<p>Leanne Lea Julie Clempson Neighbourhood Management</p>	<p>Ongoing</p>
<p>7. Continue to work with local partner agencies to raise awareness of the support and advice available to residents across the community</p>	<ul style="list-style-type: none"> • Record all local partner agencies and key contacts by way of a Directory and advertise through Neighbourhoods routine communication channels – Open House, Annual Report to tenants, Website, rent letters, rent statements, annual rent notification letters • Monitor CA Mid Mercia performance outcomes, inclusive of case studies, through quarterly partnership meetings as per new contract and updated specification • Actively promote the TAC Mid Mercia Referral system through all communication mechanisms to include 	<p>Leanne Lea Julie Clempson Steph Norton David Turner Tenancy Sustainment Officers</p>	<p>Ongoing Quarterly performance meetings</p>

	<p>website, daily case management, rent statements and letters, Open House etc.</p> <ul style="list-style-type: none"> Income representation at regular meetings with the Job Centre and DWP. Key information from all meetings to be shared with Income colleagues and team members to submit any areas of concern/issues arising, emerging trends in advance 		
<p>8. Expand the performance management framework to incorporate reports on the gains secured for TBC and residents through the financial inclusion services and projects</p>	<ul style="list-style-type: none"> Promote the positive impact that some aspects of the service such as advice with welfare benefit and budgeting have had on individuals, households and the wider community Monitor outcomes through CA Mid Mercia's quarterly reports providing positive case study examples as part of ongoing performance management Include above as part of the end of year Income Performance report Positive case examples to be routinely recorded and shared with all Income staff as part of ongoing team meetings Record and promote the positive impact of sustaining tenancies in addition to the substantial savings of preventing an eviction. In 2015, the Department of Communities and Local Government (DCLG) estimated the cost of an eviction to the taxpayer, to be between £24k and £26k. 	<p>Leanne Lea</p> <p>Julie Clempson</p> <p>Tenancy Sustainment Officers</p>	<p>Ongoing</p>
<p>9. The '<i>Tenant Involvement and Consultation Strategy</i>' is strong and we found examples of active involvement. However, we suggest that there is scope to expand involvement and participation, possibly through the Council's wider community development initiatives. The planned</p>	<ul style="list-style-type: none"> Develop/promote an annual tenant engagement recruitment campaign in partnership with TCG - promote involvement framework, benefits, outcomes, comms and advertise across other Neighbourhood services Continue to support and develop the following involvement groups under the Tenant Involvement & Empowerment framework: Tenant Involvement Group, 	<p>Leanne Lea</p> <p>Helen Rich</p> <p>Sonja Healy</p> <p>Grace Valente</p>	<p>Ongoing</p> <p>Ongoing</p>

<p>local offers review may be a good opportunity to do this. HQN client, whg's 'Community Champions Programme' may be a helpful approach for TBC to explore</p>	<p>Tenant Consultative Group, Complaints Review Panel, ASB Service Improvement Group</p> <ul style="list-style-type: none"> • Develop an engagement booklet to promote the benefits of tenant involvement and promote at tenancy sign up with a Welcome letter • Consideration to be given to the introduction of a Repairs Working Group and High Rise Tenants Panel • Explore further options for engagement through the website and through e-communication • Explore WHG Community Champions Programme 		<p>April 2022</p> <p>March 2023</p>
<p>10. Complete the service charges project to ensure that tenant charges reflect the actual cost of the service and are presented clearly to customers. We understand that the leaseholder service charge review is complete</p>	<ul style="list-style-type: none"> • Review and update the Rent & Service Charge Setting Policy • Conduct a review of both tenancy and leaseholder service charges • Ensure Clarity and transparency for residents regarding service charges within all communication 	<p>Lee Birch</p> <p>Leanne Lea</p> <p>Julie Clempson</p> <p>Trevor Wylie</p> <p>Finance</p>	<p>March 2023</p> <p>Feb/March 2022</p> <p>Ongoing</p>
<p>11. Continue to work with TBC's legal advisers regarding the management of arrears for fixed term tenancies. We understand that TBC is currently unable to take possession action due to the wording of the tenancy agreement and that a new tenancy agreement is in development. In the meantime, there may be other options available, such as pursuing money claims for rent arrears in cases where possession action is not possible</p>	<ul style="list-style-type: none"> • Seek Cabinet approve for the new FFT agreement with forfeiture clause, consultation and overall approach • Introduce and implement the new FFT agreement with forfeiture clause from 31.01.2022 for all new tenancies, renewals and transfers • Undertake training and communicate relevant changes with staff as appropriate • Complete FFTT and Tenancy Management Policy Risk Assessment • Update FFT Literature, website etc. • Seek legal clarification with regards to mutual exchanges • Procurement of external specialist support to include communication programme, Consultation 	<p>Lee Birch</p> <p>Leanne Lea</p> <p>Lisa Hall</p> <p>Julie Clempson</p> <p>David Turner</p> <p>Steph Norton</p>	<p>Completed 11.11.2021</p> <p>Completed 31.01.2022</p> <p>Completed Jan 2022</p> <p>Completed Jan 2022</p> <p>Completed 31.01.2022</p>

	strategy/methodology, drafting tenancy management policy & impact equality assessments, recommendations to cabinet/committee and implementation of new tenancy management policy		
12. Strengthen the digital offer, in line with the digital inclusion strategy. The website has some useful information but there is scope to offer more information, advice and functionality.	<ul style="list-style-type: none"> • Continue to review the website with updated and live information. • Routinely advertise the My Housing Portal, with Neighbourhoods standard strapline, to be included on rent statements, end of year letters, Open House, Annual Report, all income and other Neighbourhood communication, Also include on email signature strips • Continue to explore the digital offer through the continued use of text message, email and Whats App facility 	<p>Leanne Lea</p> <p>Julie Clempson Steph Norton</p> <p>David Turner</p> <p>Tenancy Sustainment Officers</p>	Ongoing
13. Continue to strengthen the pre-tenancy work, including: <ul style="list-style-type: none"> • Payment in advance for new tenants (unless there are exceptional circumstances) • Ensuring that DDs are set up at the sign-up • Establishing any support needs and ensuring that support is in place from the start of the tenancy • Establishing welfare benefit entitlement and ensure that measures are in place for a successful claim, including gathering UC payment dates • A pre-tenancy training offer for prospective tenants. 	<ul style="list-style-type: none"> • Ensure that the rent account and payment card is ready for the start of any new tenancy • Payment should be taken at sign-up and/or an HB claim completed • Continue with the new process in place at sign up - Key tenant information to be gathered and noted on Orchard to assist income officers with case management. To include Income/benefits, Health/disabilities that may affect the tenant being able to pay the rent, support in place including contact details, current debt/s, deductions from benefits, budgeting advice, referral to TAC, paying rent including method of payment, date, frequency of payments, claiming UC housing costs or HB housing costs – commenced Oct 2021 • Vulnerable tenants to be highlighted to the Income Team as priority and as early as possible • Routine monthly meetings to discuss new process and any identified vulnerable persons 	<p>Housing Options</p> <p>Housing Solutions</p> <p>Tenancy Sustainment Officers</p> <p>Homes Manager</p> <p>Julie Clempson</p> <p>David Turner</p> <p>Steph Norton</p>	Ongoing

<ul style="list-style-type: none"> • Linked to the above, explore the potential for reintroducing viewings rather than emailing photographs to prospective tenants. 	<ul style="list-style-type: none"> • Before signing a tenancy agreement, carry out a full risk assessment of new tenant/s to include credit checks, affordability assessment, determination of benefit entitlement, help with claiming benefit, access to advice (including budgeting and money management), and help to address existing debt, etc. • Monitor new rent arrears • Initial contact via telephone will be made within the first two weeks, followed up with a face to face visit within 6 weeks • ensure former tenant arrears are input into the new tenancy agreement • Regularly review New Tenancy Survey feedback 		
<p>14. Review the accounts where customers are paying regularly by DD but in arrears, with a view to agreeing a revised plan that brings the payments in line with the tenancy agreement, thus reducing arrears</p>	<ul style="list-style-type: none"> • Review all DD payers' accounts - where customers are paying in arrears, make contact/arrangements to move payments in line with the tenancy agreement. 	<p>Julie Clempson Steph Norton David Turner All Tenancy Sustainment Officers</p>	<p>Ongoing</p>
<p>15. Identify households who are paying council tax by DD but not the rent, with the aim of migrating them to DD for the rent</p>	<ul style="list-style-type: none"> • Identify all households paying council tax by DD and compare with above review of DD payers for rent and identify non DD rent accounts • Through a targeted approach write to non DD rent payers to highlight the benefits as per council tax payment 	<p>Council Tax Julie Clempson</p>	<p>March 2023</p>
<p>16. Review all accounts with high-level arrears, that are in receipt of UC but where an APA is not in place. This is to ensure that no opportunities have been</p>	<ul style="list-style-type: none"> • If tenants are in receipt of Universal Credit and are 8 weeks or more in arrears an Alternative Payment Arrangement (APA) application will be made to the Department of Works and Pensions (DWP). 	<p>Julie Clempson Tenancy Sustainment Officers</p>	<p>Ongoing</p>

<p>missed to protect the revenue stream to the Council</p>	<ul style="list-style-type: none"> • Undertake bi monthly arrears monitoring of high level arrears • Incomes performance management framework routinely monitors to the percentage of tenancies on Direct Debit, breakdown of tenancy type, arrears summary and details, Universal Credit PI's inclusive of APA's and breakdown by patch area. This information is automated by way of Business Objects Reports and is circulated to the team and/or Management to action as appropriate. 		
<p>17. Ensure that any arrears or payment issues are addressed when customers call regarding repairs and other housing issues</p>	<ul style="list-style-type: none"> • Monitor new tenancies carefully. Missed payments to be chased promptly, using personal contact as appropriate • Ensure that rent payment issues are addressed during the new tenancy visits/contact • Promote culture of paying your rent across all services and to all customers • Information and support details included as standard on all quarterly rent statements, on TBC website and in Open House tenants newsletter 	<p>Tenancy Sustainment Officers</p>	<p>Ongoing</p>
<p>18. Consider introducing pre-court and pre-eviction panels as further opportunities to engage with tenants to prevent escalation to court action and evictions. Ipswich Borough Council has been operating such panels successfully for a number of years and we shall be happy to furnish TBC with contact details</p>	<ul style="list-style-type: none"> • Contact Ipswich Borough Council to explore opportunity of introducing pre-court and pre-eviction panels 	<p>Leanne Lea Julie Clempson</p>	<p>March 2023</p>
<p>19. Complete the re-assignment of FTA management to the revenues team to ensure a sustained performance focus</p>	<ul style="list-style-type: none"> • A specialist officer to manage FTA - in the process of being recruited to – February 2022 • Visit Self-Assessment toolkit 	<p>Mike Buckland</p>	<p>Ongoing</p>

<p>on FTA recovery. We have provided some resources that may help, including training materials and our FTA self-assessment toolkit</p>			
<p>20. Alongside the above recommendation, ensure that there is also a focus on FTA prevention, including consistent pre-termination visits and/or calls for tenants who are ending their tenancy. These are an opportunity to address any arrears or repair issues, reducing the risk of former tenant debt accruing</p>	<ul style="list-style-type: none"> • Implement measures to prevent FTA. When a termination notice is received, use pre-termination visits to address arrears issues • Ensure a visit is made to all tenants who give notice ensuring they know their rent account must be clear and gaining a forwarding address • Former tenant's arrears letters to be sent as soon as a tenancy ends – letter/email • Continue to promote payment culture of 'Rent First' 	<p>Tenancy Sustainment Officers Tenancy Sustainment Assistants</p>	<p>Ongoing</p>

DRAFT

Leanne Lea
Tenant Regulatory & Involvement Manager
Tamworth Borough Council
Marmion House
Lichfield Street
TAMWORTH
B79 7BZ

17 December 2021

By email: leanne-lea@tamworth.gov.uk

Dear Leanne

Notification of panel decision – HQN Accredit: MIST awarded

I am really pleased to be able to confirm that the panel took the decision to award MIST accreditation to Tamworth Borough Council – congratulations! It is clear from your submission, and Tony's assessment, that you and the team are really committed to delivering a high quality service for your customers.

Your accreditation is valid for a period of three years and is subject to any conditions set out in our assessment report. We will maintain contact with you during this period and arrange for an interim assessment after 18 months to ensure that standards are maintained. We'll also use this visit to talk to you about progress made against recommendations, and other service developments and improvements.

I have enclosed your certificate and we will also organise a trophy for you. I really appreciate all the hard work that you have put into this. I hope you and everyone else who was involved feel justly rewarded and proud to achieve this accreditation. In the meantime should you have any queries please do not hesitate to contact us.

Yours sincerely



Gill Stead
Chair of Accreditation Panel

hqn

ACCREDIT: MIST –
MAXIMISING INCOME;
SUSTAINING TENANCIES

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This is to certify that

**Tamworth
Borough Council**

was awarded

**HQN Accredit:
MIST – Maximising Income;
Sustaining Tenancies**

in

December 2021

A handwritten signature in black ink, appearing to read 'Alistair McIntosh', with a long horizontal stroke extending to the right.

Alistair McIntosh,
Chief Executive, HQN



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Accredit: MIST

Maximising income; sustaining tenancies

Accreditation assessment report

Tamworth Borough Council

DECEMBER 2021

Strictly private and confidential

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1 Introduction

Tamworth Borough Council (TBC) applied to be accredited under HQN's Accredit MIST programme.

HQN's accreditation programme assesses service delivery and outcomes against a range of challenging quality standards, covering the following six modules:

- 1 Customers and communities: customer focuses, response to priorities and access to relevant services, including money advice and helps with preparing for welfare reform.
- 2 Income collection: collection and accounting of rent, service charges and other housing-related income.
- 3 Arrears management: prevention and recovery of current/former tenant rent arrears and other debt, including incentives for payment and measures to prevent eviction and abandonment due to rent arrears.
- 4 Welfare reform: including the administration of HB and UC and partnerships with benefit providers, preparation for welfare reform and management of changes to the benefit system.
- 5 Financial well-being: measures to address financial exclusion in the community and to support the financial well-being of residents. This includes helping customers to maximise their income through access to money management and welfare benefit advice.
- 6 Value for money: strategies to achieve effectiveness, efficiency and economy of services.

Organisations that meet the standards are accredited and receive an award and appropriate recognition in the housing sector.

Our assessment also considers the organisation's response to the Covid-19 crisis, in terms of supporting tenants whilst still maximising income. This includes the help available to households who are isolated and/or experiencing financial difficulties, the overall adjustment to home working and the support available to officers.

Following the award, an annual assessment is carried out to ensure that standards are being maintained.

The accreditation process and award is designed to give confidence to residents, officers and other stakeholders that the service is well run and is delivering positive outcomes and value for money.

The process is subject to scrutiny by the Accredit panel. All panel members have a wealth of experience and expertise and the panel includes at least one representative from an accredited organisation.

Accredited organisations have access to expert support and a network of organisations working to the same high standards of service delivery and performance.

This assessment took place during November 2021 and was carried out by HQN associate, Tony Newman.

This is our assessment report, setting out the context, our overall assessment against the quality standards and the assessor's recommendation to the Accredit panel.

The report is based on information provided by TBC and our findings during the assessment visit.

We would like to thank the officers and residents of TBC, together with representatives from partner agencies, who took part in the assessment, for their enthusiastic, honest and positive approach.

We would particularly like to thank the residents who gave their time to speak to us.

It is important to note that where accreditation is awarded to an organisation, it is also recognition of the contribution from all teams involved, service delivery partners and residents.

2 Context and service overview

- TBC manages around 4,734 properties, of which 365 are sheltered, 20 are supported and 397 are leasehold. The rest are defined as general needs social housing.
- TBC's stock is contained within the Tamworth town centre and surrounding borough area
- The tenant consultative group (TCG) provides scrutiny and governance overview
- TBC operates a specialist income team (IT) within its neighbourhood services team (NST).
- The income manager reports to the housing manager (HM) who reports to the head of housing management and neighbourhood resilience (HHMNR), who oversees the NST.
- The HHMNR reports to the assistant director (neighbourhoods) within the communities directorate, who also has oversight of the homelessness and housing solutions team.

- The IT comprises two income maximisation officers (IMO), six tenancy sustainment officers (TSO) and three tenancy sustainment officers (TSA).
- The TSO roles are mirrored in the neighbourhood resilience team, which is responsible for other tenancy management issues such as ASB.
- The IT is responsible for rent collection and management of current arrears.
- The TSAs deal with low level arrears, with the TSOs managing accounts with debts of £250 or more. The IMOs manage higher level arrears (over £2k).
- There is no in-house welfare benefit or money advice team. However, the IT's officers are knowledgeable regarding benefit and officers can make referrals to Tamworth Advice Centre and Citizens Advice (CA).
- Service level agreements are in place for both services and the relationships are positive and effective.
- The IT is responsible for collection and recovery of former tenant arrears (FTA) but this is moving to TBC's revenue services.
- Customer services advisers can handle routine arrears enquiries, such as account balances and can take telephone payments
- An in-house team provides support for vulnerable residents and referrals can be made for support as part of the pre-tenancy process. Officers can also refer people to the multi-agency Tamworth Vulnerability Partnership (TVP).
- There are positive relationships between TBC teams, including the revenues and benefits team and external agencies providing advice, support and social care.
- TBC continues to work closely with DWP on the expansion of Universal Credit and has a positive relationship with the local Jobcentre and DWP.
- At the time of reporting, 1,521 TBC tenants were in receipt of full service UC. This represents around 38% of the general needs accounts. 485 were on an alternative payment arrangement (APA).
- 1,699 TBC residents were in receipt of Housing Benefit (HB) at the time of reporting.
- TBC uses the Orchard Housing System to monitor and manage rent accounts. The integrated analytics module was implemented in 2019 and enables case prioritisation to enhance efficiency.
- Customers have access to the online MyHousing portal, enabling customers to view their rent account and make payments.

Our assessor found everyone that he interviewed at TBC to be knowledgeable, highly motivated and customer focused.

3 Executive summary of our assessment

Following the assessment, HQN's assessor considers that service strengths outweigh weaknesses in all six modules and recommends that TBC is awarded accreditation.

Our assessment of TBC's service against each module, is summarised in the table below.

Module	Assessment
Customers and communities	TBC demonstrates a clear customer focus, is responsive to local priorities and is continuously developing effective partnerships with other agencies to design and deliver services. This includes advice and support to establish and sustain successful tenancies. However, there has not been a customer satisfaction survey for some time. There is also scope to expand the opportunities for involvement in the service.
Income collection	TBC demonstrates an efficient collection and accounting of rent, service charges and other housing-related income. TBC sets rents in line with government guidelines and customer feedback appears positive regarding the perceived value for money for rent.
Arrears management	TBC demonstrates effective measures to prevent and recover current tenant debt. We found the case management to be swift, effective and supportive. TBC's focus on tenancy sustainment is clear. There is scope for some further improvements to the pre-tenancy process to prevent arrears. There is also a need to re-establish a focus on the prevention and recovery of former tenant arrears (FTA).
Welfare reform	TBC demonstrates effective administration/management of rent accounts where HB or UC are being claimed, has positive partnerships with welfare benefit providers and expert advice and support is available in-house and through external partners.
Financial well-being	TBC, demonstrates effective measures to address financial exclusion and enhance financial well-being in the community, including helping customers to maximise their income through money management and welfare benefit advice available through Citizens Advice, Tamworth Advice Centre and a host of other partners.
Value for money	TBC applies a robust, strategic focus on achieving effectiveness, efficiency and economy of services. Performance and costs appear to be managed effectively, with comparatively high performance and comparatively low costs. There is a need to strengthen FTA performance.

This assessor's report will be submitted to HQN's Accredit panel. The panel will meet on **13 December 2021** to scrutinise and discuss the report and decide whether to accept the assessor's recommendation.

In **Appendix A**, we provide more detail regarding the standards under each module.

In the following sections, we summarise some key findings from our assessment, followed by our conclusions and recommendations.

4 Performance

In the following sections, we summarise TBC's performance trends and compliance with HQN's accreditation standards.

The table below shows TBC's performance trends, over the past four years, against recognised key performance indicators.

Indicator	2017/18	2018/19	2019/20	2020/21
% of rent collected (incl arrears b/f)	101%	101.14%	101.92%	101.57%
% of rent collected (excl arrears b/f)	103%	103.33%	104.77%	104.42%
Total rent collected (£)	£17.699m	£17.527m	£17.672m	£18.094m
Current arrears as % of debit	2.45%	2.82%	2.87%	2.66%
Current arrears value £	£434k	£494k	£507k	£481k
FTA value £	£633k	£685k	£699k	£720k
Total debt £	£1.07m	£1.18m	£1.21m	£1.20m
FTA collected £	£36,547	£54,084	£80,169	£90,917
FTA collected %	5.77%	7.89%	11.47%	12.63%
FTA as % of debit	3.57%	3.90%	3.95%	3.98%
Value of rent written off	£42,176	£25,260	£57,249	£51,849
Evictions for rent arrears (number)	18	13	9	0
Extra revenue generated through financial inclusion and related work	NA	NA	NA	NA

We found that TBC has a clear performance focus, corporately, at team level and amongst individual officers.

Regular one-to-ones are used to focus on performance against targets and on any areas where officers and teams need to improve through training and development.

Performance is reported regularly to the senior management team to TCG members and to residents.

Based on both local and national peer comparators, TBC is a strong performer on rent collection and arrears management, with the collection rate and arrears ratio likely to position TBC in the top quartile. Maintaining this positive performance trend through the challenges arising from the Welfare Reform Act (2012) and from Covid-19, is impressive.

We are confident that TBC's strategic and operational focus on effective income management has helped to mitigate the impact of welfare reform, including the removal of the HB spare room subsidy (the so-called "bedroom tax") and the expansion of Universal Credit (UC), on performance, tenancies and households.

The focus on quantitative performance is balanced with a collective sense of concern for residents and an understanding of the challenges that many households are facing, especially those who are experiencing hardship. This ethos has proven critical during the Covid-19 crisis.

The presence of a well-led, motivated specialist team enables a sustained performance focus on income, whilst retaining effective operational links with the officers dealing with other housing management and tenancy issues.

Alongside effective external partnerships, including an SLA with CA and the TAC, we consider that this equips the service for future changes to the welfare programme, as well as the uncertainties surrounding Covid-19.

We suggest that TBC is missing an opportunity to report the financial gains from its in-house and partnership financial inclusion work.

During our case reviews, we evidenced a shared commitment to sustaining tenancies and avoiding legal action where possible.

We are pleased to note the year-on-year reduction in evictions for rent arrears. In addition to the positive social impact of sustaining tenancies, this represents a substantial saving and not just to TBC. In 2015, the Department of Communities and Local Government (DCLG) estimated the cost of an eviction to the taxpayer, to be between £24k and £26k.

Former tenant arrears (FTA) prevention and recovery is an area of concern.

The FTA cash collection rate has improved yearly since 2017/18, with a steady rise in the percentage of FTA collected. This is encouraging and indicates that TBC understands the

measures needed to boost collection rates. However, despite this increasing collection, the FTA level has continued to rise and now makes up 60% of TBC's total rental debt.

TBC recognises the need to restore the focus on FTA and the management of this income stream is passing to TBC's revenue services. We met with the manager during our assessment and we are confident that appropriate policies and procedures are being implemented to improve performance.

We are confident that despite the pandemic and associated challenges, TBC will continue to strengthen performance and customer experience.

In the next section, we summarise TBC's progress leading to the accreditation assessment.

5 Service highlights

In evaluating TBC's service against HQN's accreditation standards, we have examined the self-assessment bid, together with supporting documents.

We then carried out an online reality check, including interviews, focus groups and case reviews.

Rather than repeat the contexts of TBC's own self-assessment in this report, we present below a summary of service highlights. These include the following:

- TBC, has a clear strategic, policy and performance framework that is reflective of best practice. We noted that some policy documents are overdue for review and some are still badged as drafts. This is being addressed.
- TBC's ethos and policy regarding income management retains an explicit focus on tenancy sustainment, looking to avoid legal action unless necessary.
- TBC has a robust corporate approach to delivering value for money (VfM). This has been endorsed in recent audit reports, with the October 2020 audit concluding that TBC demonstrates strong budget management.
- A robust, SMART action plan is in place, including actions specific to the Covid-19 pandemic. Again, this links with TBC's wider plans and corporate objectives.
- TBC sets rents in line with government guidelines. Feedback from residents is generally positive regarding the value for money of rent
- TBC's approach to rent and service charge setting is centred on establishing an affordable offer to residents. This is reflected in a clear rent and service charge setting policy. However, the policy is overdue for review and updating.
- Service charges are being reviewed across TBC's stock. The leasehold review is complete and the tenancy service charges are being reviewed at the time of reporting.

TBC looks to recover the cost of each service and the charges to tenants are depooled from rent and appear to be clearly presented. Residents only pay for the services that they actually receive.

- For the income management service, TBC uses a range of benchmarking services to monitor value for money in terms of cost and performance. These include HouseMark's benchmarking service and the results appear positive, with comparatively strong performance and low costs against the key metrics we assessed
- Service standards have been agreed with the TCG and council members and are set out in a document "*Tamworth's local offers*." The standards reflect the Council's overarching vision and compliance is monitored by the TCG as part of the Council's scrutiny arrangements. However, the document is due for review and update.
- As part of the TBC offer, customers benefit from a wide choice of payment methods and satisfaction ratings are high regarding the options available. TBC has had some success in promoting Direct Debt (DD) as its preferred payment method. Flexible DD options are available and TBC operates paperless DD, which enhances efficiency.
- Tenants with a clear rent account are entered into a quarterly prize draw, with a prize of £250.
- We found TBC's information to be generally clear and helpful to residents and available through a variety of channels, including the website and the tenants' newsletter, "*Open House*". These channels have been particularly important with the advent Covid-19, with a wealth of clear, practical information and guidance available to tenants and all city residents
- We met with members of the TCG, who were able to confirm their involvement in reviewing and scrutinising the service. We also found evidence of the tenants' involvement in policy development. We suggest that there is scope to expand resident involvement in the income service
- Working closely with DWP and its own revenues and benefits team, TBC planned effectively for changes arising from the Welfare Reform Act (2012). This includes modelling the potential impact and establishing a multi-agency welfare reform group to plan for the changes. In common with other housing providers, TBC has experienced challenges arising from the introduction of benefit caps, the implementation of the under-occupation charge (the so-called 'bedroom tax') and the expansion of UC. Throughout the transitional period, customers have been updated with clear, timely information and a compelling offer of help and advice. The service has handled this well and UC is now seen as 'business as usual'
- An established specialist income management team is in place. In our experience, this helps to ensure a sustained focus on arrears prevention and recovery, alongside tenancy sustainment.

- The team is well-led and officers told us that they feel supported and valued by their managers.
- Clear standard operating procedures are documented. These are reviewed regularly and we found the processes to be reflective of best practice.
- Improvements have been made to TBC's pre-tenancy approach and processes, including an affordability check and a sign-up checklist. During the Covid restrictions, TBC moved quickly to digital sign-ups and we were impressed with the swift response to housing vulnerable people early on in the crisis.
- Internal audit reports are positive regarding the procedures and controls for rent collection and arrears management
- TBC's processes incorporate equality and vulnerability considerations. Officers can make referrals to internal and external help and we were pleased to note that a number of officers, including the IT and customer experience team, had received training in mental health first aid and suicide awareness.
- The Orchard Housing System and integral analytics module, appear to be used efficiently to prioritise arrears cases.
- Measures are in place to ensure compliance with the Ministry of Justice Pre-action Protocol prior to commencing legal action. Even before Covid, TBC only took legal action after alternatives had been exhausted.
- Some positive work has been completed on the data cleansing and management of sundry debts, including garage arrears, repair charges and FTA. However, as reported earlier, there is a need to re-establish a focus on FTA prevention and recovery.
- We found TBC's officers to be highly motivated and customer focused. We also found the officers to be knowledgeable regarding income management best practice, as well as welfare benefit and legal matters. During our case reviews, we saw evidence of effective negotiation, blending an empathetic and supportive approach with a firm expectation that customers understand and respond to their rent liability and tenancy agreement.
- IMOs, TSOs and TSAs can provide advice on general debt and welfare benefit issues. We found TBC officers to be knowledgeable on these matters, with regular expert training in welfare benefits.
- We found joint working between TBC teams and departments to be effective, including situations where multiple tenancy issues are under investigation. During our assessment, we met with TBC's head of revenues, benefits manager, housing solutions managers and the head of customer experience. All were positive regarding the relationships and partnership working between teams.

- TBC's customer experience team works well with the IT and have been trained in income management and financial vulnerability and can handle routine queries and take payments.
- Specialist advice expertise is available to residents through Citizens Advice (CA), TAC and through other external partners. Tamworth has a wealth of third sector agencies providing support to TBC residents and to the wider community. Referrals can be made directly and through the Refernet system.
- In partnership with CA, the TAC and other local partners, TBC has a strong offer to support residents' financial well-being. In addition to help with budgeting and benefit advice. A hardship fund is in place, alongside the discretionary housing payment (DHP) scheme.
- TBC's community partnerships manager ensures a strategic approach to multi-agency working through the Tamworth Co-ordination Group and the Tamworth Wellbeing Group.
- To deliver a strong support offer to customers and communities, partnerships extend across a variety of internal and external agencies, including:
 - DWP, including the local Jobcentre, to support the implementation of UC
 - TBC's benefits team to manage the legacy HB scheme and to help customers to access DHP and the hardship fund.
 - TBC's housing solutions team to prevent homelessness
 - TBC's other neighbourhoods teams to deliver a holistic approach to managing tenancies and supporting households, especially in cases of vulnerability. This also ensures a collaborative approach to managing potential tenancy breaches on multiple grounds
 - The Tamworth Vulnerability Partnership: A multi-agency group that meets weekly and co-ordinates support for vulnerable people
 - Citizens Advice (CA), to provide money advice. An SLA is in place and officers can make warm referrals direct to the service. The CA also provides the UC Help to Claim service at the local Jobcentre. CA support is also offered to former tenants experiencing hardship. We found the relationship between TBC and CA to be collegiate and mutually supportive.
 - Heart of Tamworth Community Shop.
 - TBC community development programmes, including the Employment Action Group, help residents to build their skills and knowledge, thereby boosting their career prospects.

- Local charities to support residents’ well-being and to help during crises, including the ‘Communities Together’ befriending service.
- A full directory of services is available through the Staffordshire Connects and Support Staffordshire websites.
- We also note that TBC and its partner agencies are increasingly reaching out into the private sector to help to sustain tenancies.
- TBC participates in numerous national and local forums for sharing best practice.

6 Response to the Covid-19 crisis

TBC adapted swiftly to the Covid-19 crisis, ensuring that staff were able to adapt quickly to home working.

As the crisis developed, TBC provided staff and customers with practical and timely information.

Online team and departmental meetings were introduced to manage joint working initiatives and to ensure an integrated, planned response.

The officers appear to have adjusted well to working from home, with a number of officers reporting that they feel they are working more efficiently and enjoying more positive conversations with customers.

TBC’s initial focus was on contacting all vulnerable tenants to offer support or just general advice and guidance.

We were impressed with TBC’s rapid response to ensuring that vulnerable people were safely housed, including rough sleepers. TBC’s officers were even signing up tenants on benches outside the offices.

The partnerships outlined in the previous section of this report, proved invaluable during the crisis. The multi-agency Winter Support Programme focused on providing food and shelter for rough sleepers.

During our interviews, it was encouraging to hear income officers describe the appreciation that customers have expressed to them during the crisis. This was reflected in our conversations with residents.

We were also pleased that officers told us that they feel supported by each other and by the service managers.

Driven by the Covid restrictions, TBC introduced digital offer and sign-up processes. This included suspending the viewing process, with prospective tenants receiving photographs of the offered property, on which to base their decision.

We appreciate the constraints imposed as part of the Covid restrictions but we have drawn TBC's attention to the risks of allocating tenancies without the tenant having actually visited the property.

The Coronavirus Act, together with localised and national lockdown measures, required that housing providers adapt their processes, particularly with the suspension of home visits and legal action.

TBC updated its pre-action protocol working guide for staff, to incorporate the required changes but the IT sensibly retained its focus on conversations with customers regarding any rent payment issues.

The quotes below, taken from officers during our interviews, help to illustrate the feelings around the teams' response to Covid-19. These feelings were congruent with our case review findings:

- *"It's been a fabulous response from the team"*
- *"They always go that extra mile"*
- *"Everybody is very supportive."*
- *"Our tenants find us approachable and they know they can rely on us."*

7 Quality case reviews

We reviewed twenty-two rent accounts with TBC officers. The officers were positive and helpful, and we thank them for their time.

Overall, we found TBC's case management to be strong, with the following positive features:

- A supportive and empathetic approach from TBC officers
- Generally effective pre-tenancy work, including affordability checks and emails to the IT to notify the team of new tenants. However, there is an opportunity for further improvement and consistency (see later in this report).
- Sensitive support for vulnerable residents, including referrals to specialist care colleagues and external partners
- Prompt action to address payment issues, in line with documented policies and procedures. We are pleased to see the focus on swift personal contact rather than a reliance on standard letters.

- A clear ethos of enabling successful, sustainable tenancies through proactive advice and support, including for households affected directly or indirectly by Covid-19. We found numerous cases where TBC officers worked diligently to prevent arrears escalating throughout the tenancy and to avoid legal action and possible eviction
- Effective triaging for new UC claimants, including swift application for APAs where appropriate
- Proactive support to help people to claim for DHP and from other hardship funds and grants
- Effective referrals to CA for money and benefit advice, including for new tenants
- Effective joint working between teams and with partner agencies, including DWP and TBC's HB team. HB overpayments are managed sensibly and the HB provider will adjust the recovery approach in consultation with TBC's officers
- Co-ordination with TBC's council tax department to ensure a shared approach to resolving debt issues. In one case, the council tax arrears were written off to help the person to sustain their tenancy.
- Positive interventions to manage complex and sensitive tenancy issues, especially for vulnerable customers and those experiencing hardship. Examples include:
 - Persistent and patient efforts to engage with vulnerable tenants who were proving hard to reach
 - Empathetic support from the TSO for a tenant with mental health issues. The TSO coordinated with adult social care colleagues and helped the tenant to complete their UC claim, secure a £700 DHP payment and purchase white goods and furniture through the hardship fund
 - With the vulnerable tenant's permission, working with his father to resolve a range of tenancy issues, including rent arrears. The IT secured a DHP of £1,600, thus avoiding legal action
 - Assisting a tenant with mental health issues to deal with his UC claim, address his arrears and re-enter the job market through training
 - Exceptional support for a vulnerable single mother, struggling to cope with her finances. In addition to securing a DHP and helping with the UC claim, the officers gathered together unwanted baby clothes to donate to her.

Although the cases we reviewed were well managed, we did identify some opportunities for improvement and summarise these below:

- The new tenancy checklist appears to be working well but there is scope to strengthen further the pre-tenancy work at TBC, especially with regard to identifying and mitigating risk and ensuring that support needs are met from the very start of the tenancy.

- Payment is not taken in advance, even in situations where the new tenant's rent is unlikely to be covered by UC or HB. This requirement is stipulated in the rent setting and collection policy, unless the new tenant is likely to be in receipt of welfare benefit to cover their full housing costs. We understand that payment in advance has been trialled in the north of the city
- Useful information from the sign-up is not always captured in notes on the system. This means that officers in the IT often have to read through scanned documents.
- We found several cases where tenants are paying by DD on a monthly basis but the payments are made in arrears
- Payment/arrears issues are not always raised with customers who call regarding another housing issue, including repair requests. This is a missed opportunity.

8 Meeting with residents

During our assessment, we met with three members of the tenant consultative group (TCG).

This was an opportunity to feed back our findings and to gather their views on the service and on their engagement in service development and governance.

The meeting was highly positive, with the group commenting favourably on their experiences with TBC and in working on the TCG.

The residents all reported that they feel that TBC is now listening to its residents more than in the past and gave examples of how the TCG has influenced service improvements, including helping to review the arrears process.

The TCG appears supportive of the aims of TBC in terms of income management and tenancy sustainment, especially the offer of support and advice to households experiencing hardship.

The TCG receives regular performance reports and meetings are used to scrutinise outcomes and performance data.

Progress is reported in the Open House tenant newsletter, alongside practical information on sources of support and advice. The TCG suggests topics and content for the newsletter.

The TB has been involved in policy development and in the review and redesign of documents, including letters and statements. The group was unanimous in stating that rent-related documentation is clear and easy to understand.

TCG members are also involved in tenant inspections and are keen to carry out more inspections as covid restrictions are eased.

The TCG is keen to involve more residents, so that the group reflects the diversity of the borough. This will be an important consideration arising from the Social Housing Charter.

9 Confidence and recommendations

TBC and its income management service appear to be well-led, with a clear direction corporately and at an operational level.

Based on our findings during this assessment, our confidence levels are high regarding the shape and direction of the service.

We found no material weaknesses in TBC rent income management. TBC has already identified any requisite improvements and these are captured in TBC's strategic and operational plans.

We have a few recommendations for TBC, which we summarise below. We acknowledge that some of these recommendations are already on TBC's radar:

- Review HQN's income management toolkits periodically, as self-assessment tools to continue to identify further service enhancements
- Update the policy framework, including document control to show ownership and review arrangements. This was in hand as we concluded our assessment
- Complete the planned self-assessment against the Regulator's updated Consumer Standards and the broader requirements of the Social Housing Charter.
- Linked to the above recommendation, whilst resident satisfaction appears high, there has not been a satisfaction survey for some time. We recommend that this is carried out to gather customers' formal and informal views regarding TBC's income management and tenancy sustainment offer
- The October 2020 audit report cited ongoing budget pressures and constraints. In this context, it is critical that TBC continues to monitor service demand to ensure that appropriate resources are available and are allocated efficiently. This includes the income management service and the wider provision of financial inclusion advice and support
- To expand slightly on the above recommendation, as more customers migrate to UC, arrears case management is often more complex and calls more time-consuming. We recommend that TNC avoids the income management service becoming too "lean," which could impact on performance, service delivery and create higher direct and indirect costs to the authority
- Continue to work with local partner agencies to raise awareness of the support and advice available to residents across the community
- Expand the performance management framework to incorporate reports on the gains secured for TBC and residents through the financial inclusion services and projects

- The '*Tenant Involvement and Consultation Strategy*' is strong and we found examples of active involvement. However, we suggest that there is scope to expand involvement and participation, possibly through the Council's wider community development initiatives. The planned local offers review may be a good opportunity to do this. HQN client, whg's '*Community Champions Programme*' may be a helpful approach for TBC to explore
- Complete the service charges project to ensure that tenant charges reflect the actual cost of the service and are presented clearly to customers. We understand that the leaseholder service charge review is complete
- Continue to work with TBC's legal advisers regarding the management of arrears for fixed term tenancies. We understand that TBC is currently unable to take possession action due to the wording of the tenancy agreement and that a new tenancy agreement is in development. In the meantime, there may be other options available, such as pursuing money claims for rent arrears in cases where possession action is not possible
- Strengthen the digital offer, in line with the digital inclusion strategy. The website has some useful information but there is scope to offer more information, advice and functionality
- Continue to strengthen the pre-tenancy work, including:
 - Payment in advance for new tenants (unless there are exceptional circumstances)
 - Ensuring that DDs are set up at the sign-up
 - Establishing any support needs and ensuring that support is in place from the start of the tenancy
 - Establishing welfare benefit entitlement and ensure that measures are in place for a successful claim, including gathering UC payment dates
 - A pre-tenancy training offer for prospective tenants.
- Linked to the above, explore the potential for reintroducing viewings rather than emailing photographs to prospective tenants.
- Review the accounts where customers are paying regularly by DD but in arrears, with a view to agreeing a revised plan that brings the payments in line with the tenancy agreement, thus reducing arrears
- Identify households who are paying council tax by DD but not the rent, with the aim of migrating them to DD for the rent
- Review all accounts with high level arrears, that are in receipt of UC but where an APA is not in place. This is to ensure that no opportunities have been missed to protect the revenue stream to the Council

- Ensure that any arrears or payment issues are addressed when customers call regarding repairs and other housing issues
- Consider introducing pre-court and pre-eviction panels as further opportunities to engage with tenants to prevent escalation to court action and evictions. Ipswich Borough Council has been operating such panels successfully for a number of years and we shall be happy to furnish TBC with contact details
- Complete the re-assignment of FTA management to the revenues team to ensure a sustained performance focus on FTA recovery. We have provided some resources that may help, including training materials and our FTA self-assessment toolkit
- Alongside the above recommendation, ensure that there is also a focus on FTA prevention, including consistent pre-termination visits and/or calls for tenants who are ending their tenancy. These are an opportunity to address any arrears or repair issues, reducing the risk of former tenant debt accruing.

Our assessor will be happy to discuss these further and provide positive practice examples where necessary.

Appendix A: Assessment against accreditation standards

The table below presents our assessment of TBC for each module.

Module assessment	How is this achieved?
<p><i>Module one – customers and communities</i></p> <p>TBC demonstrates a clear customer focus, is responsive to local priorities and is continuously developing effective partnerships with other agencies to design and deliver services. This includes advice and support to establish and sustain successful tenancies.</p> <p>The organisation’s response to Covid-19 demonstrates the high level of customer focus and the support available to the community.</p> <p>However, there has not been a customer satisfaction survey for some time.</p> <p>There is also scope to expand the opportunities for involvement in the service.</p>	<ul style="list-style-type: none"> • Using research into local context and customer priorities to develop its services • Involving customers in setting clear, challenging standards for its services and monitoring performance against these standards • Engaging residents, staff and partner organisations in service design and scrutiny arrangements • Listening to customers and using formal and informal customer feedback to continuously improve services • Ensuring that services are accessible to all and that people are treated equally and fairly • Using personal contact and customer profiling to shape services and to build an understanding of why tenants get into arrears, those most at risk (including the impact of welfare reform) and debt ‘hotspots’ • Making useful, relevant and practical information available in different media, formats and community languages • Making offers to help explicit in all communication • Developing effective partnerships: local authorities, advice agencies, social care, health care providers – at both strategic and operational levels • Effectively promoting and publicising the availability of services, including the importance of paying rent, the consequences of non-payment and how to access advice and support.

Module assessment	How is this achieved?
<p>Module two – income collection</p> <p>TBC demonstrates an efficient collection and accounting of rent, service charges and other housing-related income. TBC sets rents in line with government guidelines and customer feedback appears positive regarding the perceived value for money of rent.</p>	<ul style="list-style-type: none"> • Setting rents and other charges in line with government guidelines • Ensuring that rent-setting and other charging policies balance affordability and protection of vulnerable people with income maximisation and business development • Explaining all charges clearly to customers including the potential for under-occupancy and the impact of other welfare reforms on housing costs • Offering a wide choice of payment methods and explaining them clearly to customers • Exploring incentives for good payers and to encourage customers to take up Direct Debit (DD) • Setting up rent accounts promptly for new and transferring tenants • Posting payments promptly onto individual accounts.
<p>Module three – arrears management</p> <p>TBC demonstrates effective measures to prevent and recover current tenant debt.</p> <p>We found the case management to be swift, effective and supportive. TBC's focus on tenancy sustainment is clear.</p> <p>There is scope for some further improvements to the pre-tenancy process to prevent arrears.</p> <p>There is also a need to re-establish a focus on the prevention and recovery of former tenant arrears (FTA).</p>	<ul style="list-style-type: none"> • Employing a strategic approach, with effective policies and procedures that encourage a payment culture and focus on arrears prevention and tenancy sustainment • Ensuring that income specialists and other housing staff work closely together • Taking prompt, effective recovery action and use clear communication, including personal contact • Making effective use of court action, with eviction as a last resort • Ensuring that vulnerable people and those most at risk of arrears, are supported effectively • Encouraging the customer to make contact if they miss a rent payment or have debt problems.

Module assessment	How is this achieved?
<p>Module four – welfare reform</p> <p>TBC demonstrates effective administration/management of rent accounts where HB or UC are being claimed, has positive partnerships with welfare benefit providers and expert advice and support is available in-house and through external partners.</p> <p>With a sharp increase in UC claimants, particularly during the Covid-19 crisis, these services have been critical to supporting households in hardship.</p>	<ul style="list-style-type: none"> • Implementing effective service level agreements and joint working protocols with benefit providers • Helping customers proactively to claim benefit and to challenge overpayment and backdate decisions where appropriate • Promoting benefit awareness, take-up and explain the importance of advising benefit agencies and the housing provider of any changes in circumstances • Actively helping customers to understand the welfare reform programme, including timescales and to manage the potential impact on themselves and their households • Making effective use of UC direct housing payments from DWP, balancing the protection of rental income streams with appropriate support for vulnerable and low-income households • Preparing effectively for the full implementation of welfare reform, with an understanding of the risks and opportunities, a strategy for managing the changes and clear action plans.

Module assessment	How is this achieved?
<p>Module five – financial wellbeing</p> <p>TBC, demonstrates effective measures to address financial exclusion and enhance financial well-being in the community.</p> <p>This includes helping customers to maximise their income through money management and welfare benefit advice available through Citizens Advice, Tamworth Advice Centre and a host of other partners.</p>	<ul style="list-style-type: none"> • Implementing measures to raise awareness and address financial exclusion – provide money management, benefit advice, help to access ethical financial services • Helping customers to access advice and support, including direct referrals of serious or multiple debt problems to independent advice agencies • Establishing and maintaining effective partnerships with other agencies to support the financial wellbeing of customers and communities • Signposting and/or referring customers to sources of support for accessing employment and training opportunities and to address digital exclusion, fuel poverty and other issues affecting financial wellbeing.
<p>Module six – value for money</p> <p>TBC applies a robust, strategic focus on achieving effectiveness, efficiency and economy of services.</p> <p>Performance and costs appear to be managed effectively, with high performance and comparatively low costs. As mentioned elsewhere, there is a need to improve FTA performance.</p>	<ul style="list-style-type: none"> • Ensuring that income management links with other strategies such as homelessness prevention, anti-social behaviour, social and financial inclusion • Understanding costs and benefits and deliver overall value for money to customers • Monitoring and managing performance effectively, with strong comparative performance and a clear understanding of what works and what doesn't • Investing in, developing and using resources efficiently, especially information technology and staff • Planning effectively for continuous improvement.

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