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CORPORATE SCRUTINY COMMITTEE

29 January 2025

Dear Councillor

A Meeting of the Corporate Scrutiny Committee will be held in **Town Hall, Market Street, Tamworth on Thursday, 6th February, 2025 at 6.00 pm.** Members of the Committee are requested to attend.

Yours faithfully

A handwritten signature in black ink, appearing to read 'S. C. V.' with a stylized flourish at the end.

Chief Executive

A G E N D A

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- 1 Apologies for Absence**
- 2 Minutes of the Previous Meeting (Pages 5 - 14)**
- 3 Declarations of Interest**

To receive any declarations of Members' interests (personal and/or personal and prejudicial) in any matters which are to be considered at this meeting.

When Members are declaring a personal interest or personal and prejudicial 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 personal and prejudicial interest in respect of which they do not have a dispensation.

- 4 Chair's Update**
 - 5 Responses to Reports of the Corporate Scrutiny Committee**
 - 6 Consideration of Matters referred to the Corporate Scrutiny Committee from Cabinet / Council**
 - 7 Corporate Peer Challenge Report and Action Plan (Pages 15 - 68)**
(Report of the Leader of the Council)
 - 8 Corporate Plan 2025 to 2030 (Pages 69 - 132)**
(Report of the Leader of the Council)
 - 9 Quarter 3 2024-25 Performance Report (Pages 133 - 272)**
(Report of the Leader of the Council)
 - 10 Working Group Updates**
To provide an update on any working groups
 - 11 Forward Plan**
(Discussion item – link to the Forward Plan attached)

[Browse plans - Cabinet, 2024 :: Tamworth Borough Council](#)
 - 12 Corporate Scrutiny Committee Work Plan (Pages 273 - 278)**
(Discussion Item – to review the Committees work plan)
-

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.

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FAQs

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

To Councillors: S Smith, G Coates, M Couchman, H Hadley, K Norchi, B Price,
M Summers, J Wadrup and A Wells

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MINUTES OF A MEETING OF THE CORPORATE SCRUTINY COMMITTEE HELD ON 19th NOVEMBER 2024

PRESENT: Councillor S Smith (Chair), Councillors G Coates, M Couchman, H Hadley, K Norchi, B Price, M Summers and A Wells

CABINET Councillor Carol Dean
Councillor Ben Clarke

The following officers were present: Anica Goodwin (Executive Director Organisation), Joanne Goodfellow (Interim Executive Director Finance and Deputy Section 151 Officer), Nicola Hesketh (Monitoring Officer), Tina Mustafa (Assistant Director Neighbourhoods), Pardeep Kataria, Leanne Costello (Senior Scrutiny and Democratic Services Officer) and Laura Sandland (Democratic and Executive Support Officer)

55 APOLOGIES FOR ABSENCE

Apologies for Absence were received from Councillor J Wadrup.

56 MINUTES OF THE PREVIOUS MEETING

The minutes of the meetings held on 5th September and 9th October 2024 were approved as a correct record. The minutes were approved on block.

(Moved by Councillor M Couchman and seconded by Councillor M Summers)

57 DECLARATIONS OF INTEREST

There were no declarations of interest.

58 CHAIR'S UPDATE

There was no update.

59 RESPONSES TO REPORTS OF THE CORPORATE SCRUTINY COMMITTEE

The Chair updated the Committee that further to the meeting on the 9th October 2024, they attended Cabinet on the 19th October 2024 to present the Committees recommendations on the Strategic Leasehold Review item. The Chair confirmed read out the recommendations and confirmed that they were not carried. The Chair confirmed that that the meeting could be viewed on You Tube.

60 CONSIDERATION OF MATTERS REFERRED TO THE CORPORATE SCRUTINY COMMITTEE FROM CABINET / COUNCIL

There were none.

61 QUARTER 2 2024-25 PERFORMANCE REPORT

The Chair welcomed the Leader of the Council and Officers to introduce the report of the Leader of the Council to provide the Committee with an overview of Council performance for the second quarter of the 2024/25 financial year (July to September 2024). It reports the council's position in relation to progress with strategic corporate plan projects and updates on the financial position, corporate risks, audits, information governance, compliments, comments, complaints and health & safety. Cabinet will consider the report on 12 December 2024.

The Leader of the Council introduced the report highlighting the following on the dashboard before inviting questions –

- Tamworth Castle had been awarded a Welcome Accolade
- The Council had been awarded the Silver Armed Forces Employer Recognition Award
- Beauchamp Park had been updated
- The animal licensing services had achieved the RSPCE Bronze award for animal welfare

The Committee made the following comments/observations and asked the following questions:

1. The Committee were pleased to see funeral directors in Tamworth were compliant however would welcome a national register where they would to be regulated and licensed.
2. Page 26 - Clarification around how market traders and shopkeepers were being kept updated around the ongoing works around St Edithas Square. It was confirmed by the Leader that signage had been due to go up today, but this has been delayed until tomorrow due to the snow. Officers were going out and speaking to traders and shopkeepers and it was hoped that the contractors would also be doing this. The Portfolio Holder and Members were also talking to them when in the town. The Leader was using their weekly piece in the Herald to highlight that the shops are open as usual.

3. Page 28 - In relation to unfavourable variances, when we are employing temporary/agency staff do we employ them directly or do we go through an agency which can increase costs?

It was confirmed that sometimes temporary staff were employed directly and sometimes through an agency, however the Council always try to negotiate the best deal and better exit payments if the person were taken on permanently. Where they can they do try and recruit themselves however for cleaners, specialised roles, bespoke pieces of work or where the roles are only for a certain amount of time they would look at the best avenue and value for money.

4. Page 28 –With regards to the unfavourable variance what specific strategies are we implementing to address these income shortfalls and overspending and how are we adjusting our financial plans to ensure we meet our year and targets while maintaining the quality of our services?

Officers confirmed that where budgets are overspent managers are being asked to look at compensatory savings or to try and mitigate the overspend. A piece of work is being undertaken around the Assembly Rooms to look at how more income could be generated, review the budget and ensure that targets are realistic. A meeting is scheduled with the accountant at Lichfield District Council around the Joint Waste Service to understand the additional costs and action can be taken to improve the position moving forward.

5. Considering the projected reduction of balances by £360,000 and the re-profiling of £4.778 million in capital expenditures into 2025/26,

Are there opportunities to optimise underperforming revenue streams, such as exploring new initiatives to boost car park usage or revitalising events to increase ticket and catering sales?

Officers confirmed that these were on the radar and were being looked at in terms of the current year budget and the budget process moving forward. It was confirmed that a number of pieces of work were going on to look at starting from a zero-base budget and how we build up from their around current projects and work was being done to look at how the Council balance the MTFs.

The Committee expressed concerns over the figures for the general fund variance and the increase in the outturn and balances and in particular the impact of the Assembly Rooms and Joint Waste Service.

6. Whether the Assembly rooms was meant to be a self-funding enterprise or that the expectation was that the Council would always support this?

It was acknowledged that the Council has always provided a large subsidy for the Assembly Rooms and if that vision is going to change then it would need to be run in a very different way. Officers confirmed that a piece of work was being undertaken to look at the Assembly rooms which is a non-statutory service. The Council are now able to identify what is spent on every single event as they understand the questions and challenges in this area. The ongoing reports would look at a range of options, costs and delivery models.

The committee acknowledged that to be profitable the business would need to be privatised but expressed concern at losing the building from the public sector. The Council needed to be clear about what its ambitions were for the building, which may be for it to break even whilst providing a service to Tamworth residents but needed to be careful before investing

large amounts of money in to it. To look at how they can better improve and utilize the building to make it more profitable. It was important that they see the loss reducing year on year,

A motion was moved that an update on the recovery proposals for the key items that we need budgetary control over are brought to the next Scrutiny meeting.

7. Page 56 - The Committee expressed concerns in the upward trend in rent arrears and asked what specific strategy is are we implementing to effectively reduce the rising total rent arrears particularly focusing on higher value arrears and long-term debts, and how are we balancing enforcement actions with support for tenants facing financial difficulties to ensure both the financial sustainability of our housing services and the well-being of our residents?

Officers confirmed that there are trends in terms of recovery and the Council is following those trends and overall the Council was showing a positive trend and this was just not reflected in the current quarter. Overall rents arrears balances are being reduced annually with a focus on prevention supported by the figure of two evictions in the last period which is only taken as a last resort. Investment is made in Tamworth Advice Centre to provide welfare support.

8. Page 67 – Referring to page 67 and the fact that the local government Association expects one in four councils to apply for an emergency bailout in the next two years, in light of the ongoing deferral of funding reforms and the difficulty in planning beyond a one-year horizon, how does the Council's Financial Stability Plan and Productivity Plan specifically address the identified risks—such as potential income shortfalls from reduced Council Tax and Housing Rent collections, increased demand for services like homelessness support due to the cost of living crisis, rising supply costs, and the possibility of decreased revenue from attractions and events—to ensure we achieve our target risk score and maintain financial sustainability over the next three years?

Officers highlighted that the Budget and medium-term financial strategy (MTFS) process for the next five years had started with a report going to Cabinet on the 21st which touches on these issues. It is recognised that there is uncertainty around the local government settlement with an expectation of a one year settlement for 25/26 hoping that a three year settlement will follow to aid with financial planning. The Council does face a significant shortfall with the general fund balances supporting the MTFS but this will run out and therefore significant savings do need to be made which is being looked at.

9. Page 76 – It was noted that the risk appears to have got worse in this area so what detail do we have about concrete strategies that the council are implementing that engages with our diverse Communities and most vulnerable and marginalized to understand their unique issues and needs? How are we measuring the effectiveness of these efforts in strengthening community cohesion and resilience? And how are we collaborating with Key agencies to ensure a coordinated approach to address the challenges?

The Leader of the Council confirmed that this was a priority area for the Council and they had been successful in securing £660k funding from

Government to help fund recovery from the events of August 4th. The Council have commissioned the Belong Network who will be engaging with residents over the next few months to understand their concerns as a starting point for a piece of work in this area. It was confirmed that physical meetings were being held with Police and Faith Groups and the Tamworth Strategic Partnership was running again and an element of this was looking at Community Cohesion.

10. Page 89 – With increased resources including the new Climate Change Officer have what measurable progress is there on this issue? What specific, actionable measures are we implementing to enhance our borough's resilience against flooding, and are we addressing potential challenges such as staff training gaps, infrastructure development, and financial challenges in this area?

Whilst Officers did not have any specific information it was confirmed that the action plan was being work on and highlight by Members that this was being considered at IS&G Scrutiny in December.

The Leader of the Council confirmed that work was being undertaken with the Environment agency who they were in discussions with about flood defences and where they need to be which is a large piece of work.

Modelling has been done by the environment agency around where they think work should be done before looking at how these would be funded. It was not expected to involve too much work on the Council employees.

11. Page 99 - Know that Cyber security is a risk what specific additional strategies are we implementing to enhance our resilience against emerging cyber threats—such as sophisticated phishing attacks, insider threats from staff, and vulnerabilities with our cloud suppliers—to safeguard our sensitive data and ensure uninterrupted service delivery? The importance of testing was highlighted.

The Leader confirmed that this is a new risk on the matrix and would always be a risk that they would get a full response provided in writing. Officers confirmed that a pen test had recently been carried out and the they would be feeding back on that.

12. Page 104 - A question was asked around the increase in personal data breaches and the Council failure to report these within the 72 hours statutory requirement. It was clarified that the figure appears to be a typing error and that all reports were made within the required 72 hours.

13. Page 103 - There is a backlog of outstanding Audit recommendations – are these being taken seriously?

Officers confirmed that recommendations were taken seriously and that the report that was presented to the Audit and Governance contained more details and that in most cases although they may not be complete action had been taken to address the recommendation. Officers in these areas were being asked to attend future Audit and Governance meetings to advise Members of their plans and details of any actions being undertaken.

14. Page 104 - Given the significant delays in responding to Stage 1 housing complaints—with only 27% addressed within the statutory 10 working days in Quarter 2—what immediate and specific measures are we implementing to enhance our complaint handling processes, ensure compliance with statutory requirements, and restore trust in our commitment to timely and effective resolution of residents' concerns?

Officers confirmed that the Council have recognised a need for improvement following these response times and this being address by reviewing internal processes, increasing communication and collaboration with other departments and contractors including regular meetings to understand where the issues lie and how they can be addressed moving forward.

Resolved that the Committee

1. endorsed the contents of this report for consideration by Cabinet.

(Moved by M Couchman and seconded by Councillor G Coates)

The Committee moved a recommendation that:

2. An update on the recovery proposals for the key items that we need budgetary control over are brought to the next Scrutiny meeting.

(Moved by Councillor A Wells and seconded by Councillor M Couchman)

62 COUNCIL HOUSING - TENANCY MANAGEMENT POLICY

The Chair welcome the Portfolio Holder for Housing, Homelessness and Planning and the Assistant Director, Neighbourhoods to introduce the report which was going on to Cabinet to request approval for the adoption of the Tenancy Management Policy 2024, setting out the Council's approach to offering tenancies as well as how we will manage and sustain tenancies.

The Portfolio Holder introduced the report before handing over the Assistant Director who highlighted that the report was a requirement of the social housing regulator tenancy standard. There was a summary of changes at the beginning of the report and the Policy aimed to bring the policy in line with current regulation and to make it simpler to read. In addition to the policy, Cabinet were being asked to approve a full consultation on tenancy types.

The Committee made the following comments/observations and asked the following questions:

1. Confirmation that the rights of succession had changed in 2012 and whether the children of deceased parents still get succession rights?
It was confirmed that the legislation had been updated. It was clarified that the law only allows for one succession, so if the property had been under a joint tenancy and one partner was deceased then they would have the success so there would be no further line off succession, however the

Council do take a common sense approach in these circumstances, and look at the best arrangements for supporting any individuals following a death as well as considering the best use of stock. It was clarified that the legislation describes the succession as applying to spouse or civil partner i.e. husband, wife or common law partner and dependents with a time scale in place to avoid people moving in and benefitting from succession rights when this has not been their principle home, however where succession was not relevant the Council would work with people to find an onward solution.

2. In relation to fixed term tenancies which would be due to be terminated due to property size, do we support the tenant to move on to a suitable property and they are not just 'kicked out'?

The Officer confirmed that no one is made homeless as a result of this and that very few tenancies have been terminated due to under occupancy, however conversations would be started in the fourth or final year of the tenancy about the best use of stock and they have worked with some households to support them into alternative suitable accommodation.

3. As Universal Credit is paid in arrears, how do the Council work with tenants to ensure that this does not hold them back from moving?

The Officer confirmed that they support tenants to ensure they are getting all of the benefits they are entitled to and to stabilise their income from the outset and where household have entered an agreed management plan then this would not hold hinder them from moving particularly where incentive to move is relevant (it was highlighted that a report was coming to Cabinet around this in the future).

4. Should engagement in illegal activity be automatic eviction?

Officers confirmed that tenancy agreements set out clearly the rights and obligations of the tenant and the landlord and whilst this is grounds for possession, the courts expect eviction/repossession to be considered as a last resort and require landlords to work with residents to support them to try and avoid possession but there are circumstances of mandatory grounds.

5. Thanks to the Officers for making the document easier to read but commented that the work should continue to make documents accessible to all.

6. With regards to the tenancy review what is the reasoning behind the consideration of the tenancy changes and how will they benefit tenants and the Council?

The Officer confirmed that if they are going to change tenancies then there is a statutory requirement for consultation. There has been national debate around tenancy types and consumer standards requires the Council to offer the most suitable tenancy. The Council adopted fixed term tenancies 10 years ago to enable the Council to move people on quickly to make best use of stock, however there had been small numbers of this with a large administration burden. There is debate around the reintroduction of lifetime tenancy to create stable communities and this process would put tenants of that process through the Housing and Homelessness Advisory board.

7. Whether there were any significant changes in rent arrears with the introduction of the fixed term tenancies?

Officers confirmed that a piece of work would need to be done to answer that in detail however they did not see an increase as a direct consequence due to the changes in tenancy types.

8. Feedback on the estate management training completed with Anthony Collins solicitors and what benefit there was to the team?

It was confirmed that the whole team attended the training and went through the procedures arising from the new policy subject to its approval.

9. How would the Council ensure the adoption of the policy was cost effective and what impact it may have on the services?

The Officer confirmed that the Impact Assessment was attached which should address this, but the team would be happy to come back at a later date to look at this in more detail if required

Resolved that the Committee endorse the following recommendations for cabinet consideration:

1. Approved the draft Tenancy Management Policy set out at Appendix A and subsequent publication on the Council's website
2. Delegated authority to the Executive Director Communities in consultation with the Portfolio Holder for Social Housing, Homelessness & Planning to make the final amendments to the Tenancy Management Policy (Appendix A).
3. Approved the completion of a full review and consultation on the types of tenancies the Council grant and report back separately to Cabinet during the Summer of 2025/26.

(Moved by Councillor B Price and seconded by Councillor M Couchman)

63 WORKING GROUP UPDATES

The Committee does not currently have any working groups.

64 FORWARD PLAN

There were no items identified from the Forward Plan.

65 CORPORATE SCRUTINY COMMITTEE WORK PLAN

The Chair advised the Committee that in line with the Constitution moving Forward where a Member wishes to add an item to the Work Plan, a completed work planning proposal form will need to be completed and submitted to the Chair and Democratic Services before the meeting. The Committee will then consider this at the next meeting and decide whether it is a suitable item to be added to the work plan and a date for the item to be considered will be decided.

A copy of the form would be circulated and added to the agenda in future.

The Chair confirmed that the next meeting of the Committee would be on the 6th February 2025 where they were expecting the quarter 3 performance report. For this meeting if there were any items that the Committee wished to be added to the plan then could they complete a Work Planning Proposal form and email it to the Chair and Democratic Services by the 6th December then we can put an informal meeting on this occasion during the week of the 9th December to consider any items for the next meeting and then moving forward we will use the new process.

The Chair thanked everyone for attending the meeting and closed the meeting at 7:26pm.

Chair

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Thursday, 6 February 2025

Report of the Leader of the Council

Corporate Peer Challenge Report and Action Plan

Purpose

To advise members of the Local Government Association (LGA) Corporate Peer Challenge Report and seek approval for the draft action plan in response to its recommendations and any follow-up actions to complete the challenge in the required timescale.

Recommendations

It is recommended that:

1. The committee note the publication of LGA Corporate Peer Challenge Report as set out in Appendix 1.
2. The committee comments on the draft action plan developed to respond to the recommendations as set out in Appendix 2
3. The committee endorses the delegation to finalise development of this plan and publish it before the 31 March 2025 deadline.
4. The committee endorses the plans to provide updates on a quarterly basis and identifies any further reports it may need as part of the workplan to support this review.

Executive Summary

A Corporate Peer Challenge (CPC) is a voluntary process which forms a key part of the LGA's [improvement and assurance framework](#) for local government. It underpins the principals of Sector-led improvement (SLI) to support continuous improvement and assurance across the sector and is recognised as assisting councils to meet their [Best Value duty](#) to gain assurance both of the performance of its services and corporate governance

The LGA encourages all councils to have a Corporate Peer Challenge every five years and to publish their reports online. In addition to publishing the feedback report by 31 January 2025, we are also required to develop an action plan to be published no later than 31 March 2025. For transparency it is recommended to publish the action plan alongside the report if at all possible.

The peer challenge process reviews five core components providing a high-level, external 'health-check' centred upon understanding of local context and priority setting, financial planning and viability, political and managerial leadership, governance and decision making and organisational capacity. We also asked the team to look at our plans to address community cohesion and our use of technology and digital innovation.

During the three-day challenge, the team spoke to more than seventy people including a range of council staff, members, external partners and stakeholders and gathered information and views from more than 30 meetings. The final report from the LGA is attached at **Appendix 1**. The overall opinion is very positive about how the Council performs across the subject areas.

As with all challenges, areas for improvement are identified and twelve key recommendations were made by the review team, and these are set out within pages 6 to 9 of the final report. An action plan comprising these recommendations with associated action points can be found in **Appendix 2**. It is proposed the delivery of the action plan is monitored at the Corporate Projects Programme Board and formally reviewed by Cabinet as part of the quarterly performance update report.

Options Considered

This was a voluntary process to provide assurance which should be undertaken every 5 years. Once entered into, the feedback report must be published and an action plan then developed as previously advised to members. Cabinet and Senior officers have had an opportunity to review and challenge any findings from the Peer Challenge but are now obliged to publish the report and a supporting action plan in due course.

Resource Implications

There are no financial implications as a direct result of this report. The action plan in response to the recommendations has been developed alongside the draft Corporate Plan 2025-2030 and the 2025/26 budget process to ensure sufficient priority, resources and pace can be put to the actions to have clear improvements in place by the time the Peer team return in September 2025. These actions should be prioritised as being necessary to provide assurance. There may be additional financial resource requirements to deliver on some of the actions within the plan which will be reported to Members as appropriate.

Legal/Risk Implications Background

None specifically for this report. Authorities who fail to engage with the CPC process are being challenged by both the Local Government Association and the Ministry of Housing, Communities and Local Government.

Equalities Implications

An Equality, Social Inclusion and Health Impact Assessment (ESHIA) has been completed and attached at **Appendix 3** – No issues relevant to decisions in this report other than to note the far-reaching impact on policy and strategy development for the coming financial year, which has been considered as part of the budget setting and service planning process.

Environment and Sustainability Implications (including climate change)

Not relevant to this report

Background Information

Tamworth Borough Council had its last CPC in 2013. There has been considerable change and challenge across the sector since this period, and the organisation itself has had some significant changes including a new Leader and Cabinet following the borough election in May 2024, and a new Chief Executive who started in April 2024. This CPC was commissioned to support the council in the next stage of its journey.

A CPC provides robust, strategic and credible challenge and support to avoid insularity within councils and covers five core elements:

- Local priorities and outcomes
- Organisational and place leadership
- Governance and culture
- Financial planning and management
- Capacity for improvement.

In addition, the team were asked to:

- review how the council can make best use of Information and Communication Technologies (ICT) including emerging technologies to support innovation and the delivery of corporate objectives.

- take account of the councils emerging plans for community cohesion following the civil unrest on 4 August 2024.

The CPC process was conducted on 29 to 31 October 2024 and the peer team held over thirty meetings with seventy stakeholders, staff and members. During their visit, the Peer Challenge team were struck by the immense pride held by staff, members, residents, and stakeholders, particularly in relation to Tamworth's rich history and unique heritage.

Following the CPC visit, a report outlining the key findings and recommendations from the peer team was shared with the council as set out in Appendix 1. The overall opinion is very positive about how the Council performs across the subject areas and many areas of good practice but also urges the Council to face the significant financial challenges ahead and address these as our most immediate and pressing priority.

During December this report was carefully considered by officers and members to develop an action plan set out in Appendix 2 to address the recommendations. Due to the overlaps with this work and the new corporate plan a delegation is requested to allow any amendments to actions and timings necessary as the service plans for 2025/26 are being finalised. In the spirit of openness and transparency, we are now required to publish this feedback report, swiftly followed by the final version of our action plan.

It is proposed the delivery and monitoring of the action plan is overseen by the Corporate Projects Programme Board and for it to be formally reviewed by Cabinet each quarter as part of the quarterly performance report.

Members will be aware from previous reports that a progress review will take place approximately ten months after the original 3-day challenge. The progress review provides space for a council's senior leadership to report to the peer team on the progress made against the CPC recommendations, discuss early impact or learning and receive feedback on the implementation of the action plan. This is provisionally scheduled for early September 2025.

Following the progress review, a final report outlining the peer team's findings is shared with the council. In the spirit of openness and transparency, the council are required to publish this report no later than 12 months after the original CPC, which is 31 October 2025 to complete the challenge.

Report Author

Christie Tims – Corporate Project Co-ordinator
Anica Goodwin – Executive Director Organisation

List of Background Papers

Cabinet Report [LGA Peer Assessment 2013](#)
LGA [Feedback 2013](#) and [Letter 2013](#)
LGA [improvement and assurance framework](#)
Statutory [Best Value duty](#)
Cabinet Report [Corporate Peer Review June 2024](#)

Appendices

Appendix 1 – LGA Corporate Peer Challenge Report
Appendix 2 – Corporate Peer Challenge Draft Action Plan
Appendix 3 – EQSHIA Corporate Peer Challenge Report and Action Plan

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LGA Corporate Peer Challenge

Tamworth Borough Council

29 – 31 October 2024

Feedback report



Corporate Peer Challenge



Contents

- 1. Introduction 3
- 2. Executive summary..... 3
- 3. Recommendations 6
- 4. Summary of peer challenge approach 9
- 5. Feedback 12
- 6. Next steps 27

1. Introduction

Corporate Peer Challenge (CPC) is a highly valued improvement and assurance tool that is delivered by the sector for the sector. It involves a team of senior local government councillors and officers undertaking a comprehensive review of key finance, performance and governance information and then spending three days at Tamworth Borough Council to provide robust, strategic and credible challenge and support.

CPC forms a key part of the improvement and assurance framework for local government. It is underpinned by the principles of Sector-led Improvement (SLI) put in place by councils and the Local Government Association (LGA) to support continuous improvement and assurance across the sector. These state that local authorities are: Responsible for their own performance, Accountable locally not nationally and have a collective responsibility for the performance of the sector.

CPC assists councils in meeting part of their Best Value duty, with the UK Government expecting all local authorities to have a CPC at least every five years.

Peers remain at the heart of the peer challenge process and provide a 'practitioner perspective' and 'critical friend' challenge.

This report outlines the key findings of the peer team and the recommendations that the council are required to action.

2. Executive summary

There is a strong sense of pride, amongst all those who met with the peer team, about Tamworth, its ancient origins and unique heritage. We found the council is ambitious for the future, including major regeneration projects underway to transform the town centre.

The council's new chief executive (who started in April 2024) is helping to bring new energy, fresh ideas and thinking to the council. Together with the new Leader and political leadership (May 2024) they are setting a new organisational direction through the development of a new (draft) Corporate Plan. There are ambitions to

3

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Chief Executive: Joanna Killian

President: Baroness Grey-Thompson

strengthen digital transformation, innovation, visibility, equalities, community wellbeing and cohesion, whilst delivering excellent services. During our time at the council, we observed good joint working between senior officers and cabinet members. We also met with officers who are a great asset to the council. They are dedicated, passionate and committed to Tamworth as a place and as a council.

The council faces significant financial challenges and addressing this needs to be the council's immediate and pressing priority. The Medium-Term Financial Plan shows a deficit that increases from £3.3m in 2025/2026 to £5.0m in 2028/2029. The current projected use of reserves is unsustainable in the medium and longer term with a projected shortfall of £9m by 2028/2029. Whilst we found that the scale of this challenge is well understood by the senior political and managerial leadership, the time to act is now. It is the view of the peer team that the current areas for targeted savings appear aspirational rather than tangible and deliverable. We recommend that the council (and urgently) develops a clear savings plan incorporating tangible, costed and deliverable savings with robust senior management and member oversight. It will also be important to ensure that the draft Corporate Plan is closely aligned to the council's budget plans, required savings, resources, ways of working and capacity to deliver.

As the council progresses work on the new corporate priorities and savings plan, there is an opportunity to review organisational structures and ways of working. This is explored in more detail in section 5.5 of this report. This will help to ensure sufficient capacity and resource is in place to deliver against the agreed priorities.

The council's long-term assets comprise of some extensive liabilities including £20million of investment properties, £13million of long-term debtors and £10 million of long-term investments. We recommend that you continue to progress and prioritise work (already started) to implement the refreshed Asset Management Strategy. The council needs to be confident that it is able to exercise responsible ownership, manage risk and exercise control over the asset base.

The peer team heard from a wide range of statutory and voluntary sector partners about the council's rapid, joined up leadership and response to violent disorder that occurred at a local hotel housing asylum seeking people over the summer. The

4

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council were seen as a key convener and responded quickly to condemn the violence. We were pleased to hear how the council have commissioned an 'honest conversations' community engagement project to help build an understanding of the issues, challenges and strengths in relation to community cohesion.

We recommend that the council use the outcome of the 'honest conversations' project to inform work to review, develop and strengthen communication and consultation approaches. This emerged as a consistent theme during the peer challenge. (more details in section 5.1). It should also be used to inform work to build asset-based community engagement and strengthen community cohesion through the development of a new Community Cohesion Strategy for Tamworth (more details in section 5.3).

A new Equality and Diversity Strategy (EDI) is being developed. This is positive as we believe it will support the council's work on community cohesion. Fostering good relations between different groups of people is a key part of the public sector equality duty. We recommend that you use the new EDI Strategy to help bring to life a common vision and sense of belonging for all communities, staff and councillors.

We were impressed with the council's success in attracting significant external investment to re-generate Tamworth Town Centre. However, some residents and business stakeholders who met with the peer team said they are not always clear on how the Future High Streets Funding is being used or that they don't always feel that their views are heard. It is important that the work outlined above to strengthen communication and consultation approaches includes Town Centre Regeneration. It will also be important to continue work, already started, to bring together recent and planned developments to formulate a single Town Centre Regeneration Strategy.

The council is a social landlord and we heard how they have recently triggered a self-referral to the Regulator of Social Housing due to issues of non-compliance with the required standards. It is positive that the council's leadership have been pro-active, open and transparent in this way. While positive initial progress has been made it is important that you maintain corporate focus and drive on delivering the required improvements.

5

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Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

Chair: Councillor Louise Gittins

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President: Baroness Grey-Thompson

During the Corporate Peer Challenge, the peer team were presented with examples of strong corporate governance and assurance processes. We recommend that you continue work to strengthen the culture of assurance and good governance across the council to ensure it is seen as everyone's responsibility. This should include, as part of your Member Development Plan, training on audit and governance for all councillors. There is also an opportunity to review the council's overview and scrutiny structures to ensure they align with your new emerging priorities.

Consideration should be given to strengthening how the statutory officers of the council (head of paid service, section 151 officer and monitoring officer) work together to ensure a voice in all decision making. This should be in line with the latest Lawyers in Local Government (LLG), Chartered Institute of Public Finance Accountants (CIPFA) and Society of Local Authority Chief Executives (SOLACE) guidelines¹. Consideration should also be given to the position of the statutory roles within the structure to ensure they contribute effectively to strategic leadership, decision making and policy development.

The peer team recommends that a clear plan is developed to address the ambition to strengthen digital transformation of council services. This should be aligned to the emerging Corporate Plan once agreed. It will be important to ensure the council has sufficient capacity and resource to achieve digital transformation that delivers innovative, efficient and effective service delivery to the customers

3. Recommendations

There are a number of observations and suggestions within the main section of the report. The following (below) are the peer team's key recommendations to the council.

The peer team recognise that there is a lot to do and that prioritisation and sequencing will be key. It is positive that work to strengthen community cohesion and equalities, diversity and inclusion is already progressing. In addition to this, ensuring future financial stability through achieving the required level of savings should be the

¹ [Code of Practice on Good Governance for Statutory Officers](#)

council's immediate priority. This will be a key factor in the delivery of the council's future priorities and ambitions.

The peer team's recommendations relating to the council's future organisational structure, ways of working and digital transformation should also be prioritised as this will help to ensure corporate capacity to deliver against the council's stated priorities and deliver improved outcomes for communities.

3.1 Develop a clear plan to address your financial challenges incorporating tangible, costed and deliverable savings with robust governance oversight

The council is currently relying on reserves and balances to meet the gap which is unsustainable in the medium and longer term. The council needs to act now to develop a clear savings plan incorporating tangible, costed and deliverable savings with strong political and managerial leadership and oversight.

3.2 Align your financial plans to your emerging new Corporate Plan

Once agreed, the new Corporate Plan will guide planning and decision making for Tamworth Council over the next five years. It is important that the new Plan is aligned with the council's resources and capacity to deliver.

3.3 Ensure you are fully meeting obligations, managing risk and exercising control over the asset base and investments

The council's property base comprises some important assets with extensive liabilities attached. Progress your work on Asset Management, following the recent refresh of the Asset Management Strategy. Ensure the council is confident that it is able to exercise responsible ownership, manage risk and exercise control over the asset base.

3.4 Ensure the new Equality, Diversity and Inclusion (EDI) Strategy is used to bring to life a common vision and sense of belonging for all communities, staff and councillors

Ensure leadership and organisational commitment to this work to help embed EDI

7

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Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

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principles across everything the council does including work to strengthen community cohesion.

3.5 Continue to deliver the Social Housing Improvement Programme working with residents and the Regulator of Social Housing

It is positive that the council have been proactive, open and transparent, triggering a self-referral to the Regulator of Social Housing. It is important that you maintain focus and drive on your improvement journey.

3.6 Review, develop and strengthen communication and consultation approaches

We recommend that the council develops an overarching communications and consultation plan. This should help to further strengthen closer engagement with communities. Use the outcome of the 'honest conversations' project to inform approaches.

3.7 Develop your overarching Town Centre Regeneration Strategy and use this as an opportunity to strengthen communication approaches in relation to town centre regeneration

Continue the work (already started) to develop an overarching Regeneration Strategy, which seeks to masterplan development across the town and use this an opportunity to strengthen your communication approaches in relation to town centre regeneration.

3.8 Use the Honest Conversations Project to build asset-based approaches to your work in communities and inform your community cohesion plan

It is positive that the council have attracted external funding to commission a project to engage different communities in honest dialogue about living in Tamworth, strengths, opportunities and challenges. This should be used to inform the development of a 'strengths based' community cohesion strategy and action plan for Tamworth.

3.9 Review your organisational structure and future ways of working, ensuring this aligns to/enables delivery of your priorities and ambitions

8

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President: Baroness Grey-Thompson

The aim should be to ensure that there is sufficient capacity and resource to delivery against agreed priorities.

3.10 Continue to strengthen the culture of assurance and good governance across the council, including how statutory officer functions work and are distributed across the authority

This should be in line with the latest Lawyers in Local Government (LLG), Chartered Institute of Public Finance Accountants (CIPFA) and Society of Local Authority Chief Executives (SOLACE) guidelines. It will also be important to ensure the Member Development Plan provides training on audit and governance for all councillors, helping to ensure assurance and governance are seen as everyone's responsibility.

3.11 Review the council's Overview and Scrutiny structures in support of your corporate priorities

We heard particularly that there may be opportunities to review the Health and Wellbeing Overview and Scrutiny Committee to give it a greater focus on community wellbeing and community cohesion.

3.12 Develop a comprehensive plan to achieve digital transformation putting customers at the heart

It is important that it aligns with the new corporate plan once agreed. It should ensure that the council has sufficient capacity and resource to achieve digital transformation that delivers innovative, efficient and effective service delivery to the customers.

4. Summary of peer challenge approach

4.1 The peer team

Peer challenges are delivered by experienced elected member and officer peers. The make-up of the peer team reflected the focus of the peer challenge and peers were selected by the LGA on the basis of their relevant expertise. The peers were:

- Rebecca Huddleston, Chief Executive, Wyre Council.

- Councillor Alan Rhodes, Cabinet Member for Corporate and Financial Services, Bassetlaw District Council.
- Councillor Nick Worth, Leader, South Holland District Council.
- Gordon Bryant, Section 151 Officer, Torridge District Council.
- Andrea Curson, Head of Customer and Digital, Horsham District Council.
- Jyotsna Leney, Community Partnerships Manager, Folkestone and Hythe District Council.
- Peer Challenge Manager – Cindy Lowthian, Senior National Adviser, Local Government Association (LGA).

4.2 Scope and focus

The peer team considered the following five themes which form the core components of all Corporate Peer Challenges. These areas are critical to councils' performance and improvement.

1. **Local priorities and outcomes** - Are the council's priorities clear and informed by the local context? Is the council delivering effectively on its priorities? Is there an organisational-wide approach to continuous improvement, with frequent monitoring, reporting on and updating of performance and improvement plans?
2. **Organisational and place leadership** - Does the council provide effective local leadership? Are there good relationships with partner organisations and local communities?
3. **Governance and culture** - Are there clear and robust governance arrangements? Is there a culture of challenge and scrutiny?
4. **Financial planning and management** - Does the council have a grip on its current financial position? Does the council have a strategy and a plan to address its financial challenges? What is the relative financial resilience of the council like?
5. **Capacity for improvement** - Is the organisation able to bring about the improvements it needs, including delivering on locally identified priorities? Does

10

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the council have the capacity to improve?

As part of the five core elements outlined above, every Corporate Peer Challenge includes a strong focus on financial sustainability, performance, governance, and assurance.

At the council's request, under theme two, the peer team included a particular focus on community engagement and community cohesion. In relation to theme five, the peer team included a particular focus on the use of Information and Communication Technologies (ICT) to support innovation and delivery of priorities

4.3 The peer challenge process

Peer challenges are improvement focused; it is important to stress that this was not an inspection. The process is not designed to provide an in-depth or technical assessment of plans and proposals. The peer team used their experience and knowledge of local government to reflect on the information presented to them by people they met, things they saw and material that they read.

The peer team prepared by reviewing a range of documents and information in order to ensure they were familiar with the council and the challenges it is facing. This included a position statement prepared by the council in advance of the peer team's time on site. This provided a clear steer to the peer team on the local context at Tamworth Borough Council and what the peer team should focus on. It also included a comprehensive Local Government Association (LGA) finance briefing (prepared using public reports from the council's website) and a LGA performance report outlining benchmarking data for the council across a range of metrics. The latter was produced using the LGA's local area benchmarking tool called LG Inform.

The peer team then spent three days onsite at Tamworth Council during which they:

- Gathered evidence, information, and views from more than 30 meetings, in addition to further research and reading.
- Spoke to a wide range of people including a range of council staff together with councillors and external stakeholders.

11

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This report provides a summary of the peer team’s findings. In presenting feedback, they have done so as fellow local government officers and members.

5. Feedback

5.1 Local priorities and outcomes

The political and managerial leadership are overseeing the development of a new corporate plan (to be shared at full council in February 2025) which sets out the council’s future vision, priorities and values for the next five years. The current Corporate Plan timeline expires in 2025.

We found that there has been positive engagement to inform the development of the new corporate plan. In addition to a review of socio-economic data, the council have used results from the latest residents’ survey, a series of consultation events between June and August 2024 and an on-line questionnaire. A strategic partnership meeting was held in September 2024 to discuss opportunities for collaborative working around emerging priorities.

Conversations we had with staff indicate a renewed focus and sense of optimism around the new draft corporate plan and a desire to be involved. We heard *“I couldn’t recognise where I was in the old Corporate Plan, now I can see where I am.”*

However, there are concerns around capacity to deliver from some staff at all levels of the council. We heard that *“it is difficult to re-build the plane whilst you are flying it”*. As the council moves forward with the emerging (new) corporate plan, it is important to ensure that this is aligned to the medium-term financial strategy, wider organisational resources, ways of working and capacity of the council to deliver. Clear prioritisation and sequencing of associated programmes and projects will be key.

The council’s senior political leadership are committed to becoming a ‘Co-operative Council’ as part of the Co-operative Council Innovation Network. This network is a collaboration between councils who are committed to finding better ways of working for, and with, local people for the benefit of their local community. We recognise that the council is at the early stages of this journey, but it will be important for the

12

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council's political leadership to provide greater clarity for councillors, officers and communities on what this means for them and for Tamworth and agree next steps.

Peers were pleased to learn that a new Equality and Diversity Strategy (2025 to 2028) is being developed. It is positive that empowering staff to participate within and create staff networks is identified as an action. It is important that all involved see the link between this new strategy and wider work on community cohesion. Fostering good relations between different groups is a key part of the public sector equality duty. We recommend that you use the new strategy to help bring to life a common vision and sense of belonging for all communities, staff and councillors.

Tamworth Council own and manage their own social housing stock (c. 4,300 homes). In accordance with the requirements set out by the Regulator of Social Housing, the council triggered a 'self-referral' to the Regulator in August 2024. The self-referral relates to issues of non-compliance or potential non-compliance with the required 'Consumer Standards²' (published in April 2024).

It is positive that the council have been proactive, open and transparent, triggering the self-referral and publishing details as part of public reports to both the Corporate Overview and Scrutiny Committee and Cabinet in October 2024. An improvement plan has been developed, overseen by a Homelessness and Housing Advisory Board, with weekly updates to the council's Leadership Board.

The published reports (referred to above) show progress is now being made across all asset compliance areas. It is important that you continue to maintain corporate focus and drive on delivering the required improvements, working with the Regulator of Social Housing. This includes the need to improve overall tenant satisfaction measures which are down from 78 per cent (2022/2023) to 58 per cent overall (2023/2024). It is positive that work is currently taking place to develop a refreshed tenant involvement and engagement strategy.

In 2019, the council made a commitment to become net-zero carbon for its activities by 2050 (and an aspiration to achieve 2030 should the council be financially able to

² <https://www.gov.uk/guidance/factors-for-assessing-regulatory-issues>

do). There are examples of positive work taking place including a Greenhouse gas baseline inventory (August 2022), energy efficiency commitments within the Housing Strategy (2020 – 2025) and the adoption of an Electric Vehicle Charging Infrastructure Strategy. A workshop was held recently with officers and assistant directors to update on this work³. However, during the peer challenge we heard very little reference to climate change from those who met with us. We understand the council has recently commissioned work to develop a clear plan to embed climate change priorities across the organisation and it is important that you maintain momentum on this.

5.1.1 Performance

Peers considered LG Inform⁴ benchmarking data and how the council compare to their statistical nearest neighbours. We saw how most of this comparative data compares favourably or around the average of statistical nearest neighbours.

The council compares less favourably to statistical nearest neighbours for the average time taken to process housing benefit claims and change events for 2023/2024 (Tamworth is five days and the average is four days). However, their performance is around the average of all district councils in the West Midlands.

The council also compares less favourably for the rate of new business enterprises/start-ups per 10,000 population aged 16 and above (latest benchmarking data is for 2022). The rate for Tamworth is 43.4 and the average is 53. It is positive that the council's regeneration plans for the town centre include provision for new start-up businesses, as this will be an opportunity to increase this number,

Peers were pleased to see that the council has an agreed performance management framework in place, aligned to the current Corporate Plan which expires in 2025. As the council finalises development of the new Corporate Plan, it is important to review the performance management framework, including performance indicators, to ensure alignment with the new Corporate Plan.

³ Quarter One Performance Report, Tamworth Council

⁴ LG Inform is the Local Government Association's Benchmarking Tool

Peers were impressed that almost 100 per cent of staff have had a Personal Development Review (appraisal). Looking ahead, we were pleased to hear how the focus will now be on improving the quality of these reviews. This will be important as the appraisal process is a key tool for the council to manage performance, provide learning and development opportunities and identify talent.

We were pleased to see how quarterly performance reports are shared with Corporate Management Team and published, in an open and transparent way, as part of papers to the council's Corporate Overview and Scrutiny Committee and Cabinet. As the council finalises the development of the new Corporate Plan, we recommend that you review this report template to see if can be made more succinct/user friendly as it currently comprises of over 105 pages. There are also opportunities to strengthen the use of benchmarking data. This will help the council to compare how it performs relative to others.

5.2 Organisational and place leadership

The council's chief executive (who started in April 2024) is helping to bring new energy, fresh ideas and thinking to the council. As outlined above, together with the new Leader and political leadership (May 2024) they are setting a new organisational direction through the development of a new (draft) Corporate Plan.

Both the managerial and political leadership are seen as visible, recognised and respected. Staff welcome the monthly 'chat with the chief' on-line meetings, providing an opportunity for them to learn more about different work areas. We heard about regular 'walkabouts' involving the chief executive, ward members and relevant staff. They meet in different wards and localities to discuss issues and this is valued by all those involved.

During this peer challenge, we met with resident groups, voluntary and community sector groups and business representatives who voiced some frustrations about the council's current approach to communication and engagement. The regeneration of the town centre was cited as an example. There were also mixed levels of understanding about physical access points (for the council), accessibility of council staff and the future of Marmion House.

15

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Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

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The peer team acknowledge that the groups who met with us can represent only a narrow sample of stakeholders and cannot reflect the voice and perspectives of all stakeholders. We also heard of positive examples of engagement approaches including work to develop the new Tenant and Leaseholder Engagement Strategy and new approach to commissioning of a 'statistically representative' and 'benchmarked' residents survey.

We recommend that the council should build on these positive examples to review, develop and strengthen the council's overarching communication and consultation approaches. This will also be key in supporting the council's overall approach to community cohesion. We'd encourage the council to consider the development of an agreed set of principles to underpin future consultations, along with an overarching plan aimed at building more consistent, planned, timely, genuine and accessible approaches. There may be opportunities to build on the work already taking place to develop the new Tenant and Leaseholder Engagement Strategy (rather than duplicating this).

We were impressed with how the council has, over a number of years, successfully attracted significant external funding to drive forward regeneration of the Town Centre. This includes £21.6m from the Future High Street Fund. It also includes funding awarded via the Cultural Recovery Fund, National Lottery Heritage Fund, United Kingdom Shared Prosperity Funding (UKSPF), Heritage Lottery Funding and the Local Enterprise Partnership 'Single Growth Fund'.

During our time at Tamworth, peers visited the town centre to learn more about this work. Transforming Tamworth is described on the council's website as '*a whole range of plans and initiatives, all coming together to change the town for the better*'. This is funded via a mix of external funding and Tamworth Council funding.

Transforming Tamworth involves the re-location of Tamworth College into a new town centre building, development of a new enterprise centre for small businesses, enhancements to the Castle Gateway and work to transform St Editha's Square. The council is also developing plans to regenerate the 'Gungate Development' on the edge of the town centre. It will be important to continue work, already started, to bring together recent and planned developments to formulate a single Town Centre Master

16

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Plan. This should help to maximise outcomes from the investments and shape future schemes.

As outlined above, we picked up some frustrations from resident and business representatives associated with perceptions around communication and consultation in relation to town centre regeneration. Some told us that they are not always clear on how the Future High Streets Funding is being used or that they don't always feel that their views are heard. As you work towards formulating your single Town Centre Regeneration Strategy, which seeks to masterplan development across the town (as outlined above), we recommend that you use this as an opportunity to strengthen your communication approaches in relation to this and Town Centre Regeneration.

As part of this work, there are also opportunities to strengthen Tamworth's Place narrative, building on 'Transforming Tamworth'. The aim should be to strengthen a shared understanding and 'expression' of Tamworth as a place and support place marketing objectives. Residents, in particular, are proud of Tamworth's heritage and see this as a significant asset.

The council should also maintain focus on the timeline for the development of the new Local Plan (2022 – 2043). This will replace the current Local Plan which covers the period 2006 to 2031. The new Local Plan will be a key document to guide future regeneration and development in the borough.

The council's voluntary, community, statutory and private sector partners spoke positively about partnership working and welcome the drive, led by the Chief Executive, to re-establish (in September 2024) the Tamworth Strategic Partnership. We understand that next steps will include shaping a shared strategic borough wide plan to deliver shared ambitions for Tamworth. This is important as it will help to build partnership capacity around the delivery of shared priorities including community cohesion.

The council is also a well-respected partner on the Staffordshire Leaders Board which brings councils, including Staffordshire County Council, together. We understand the Board have recently written to government about their readiness to work them in relation to future devolution opportunities. During the peer challenge,

17

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Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

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national government indicated that they may look at future local government re-organisation (LGR) in some areas, with further details to follow. In this context, it will be important for the council to continue to engage in these discussions whilst not losing sight of delivery of its agreed priorities and ambitions for Tamworth.

Community Cohesion

As outlined earlier in this report, we heard from a wide range of statutory and voluntary sector partners about the rapid, joined up response to violent disorder that occurred outside a local hotel housing asylum seeking people over the summer. There was a sense that the council acted as a convenor, working together with partners to condemn the unrest, respond to the immediate events and support all those affected. We heard how staff went above and beyond to support the clean-up operation after the disorder.

We were pleased to hear how the council's leadership have worked constructively with government following this unrest and secured £600,000 of external funding from the Community Recovery Fund. We heard how the council are using this funding to commission an 'honest conversations project' to engage communities in honest dialogue about living in Tamworth, strengths, opportunities and challenges.

We recommend that the council use the outcome of the 'honest conversations' project to help build asset-based community engagement approaches and community cohesion across the borough. This approach involves working alongside communities to identify and harness existing assets, such as resident groups, community groups, cultural heritage groups, art groups, faith groups, schools and other networks, to help bring communities together and build positive relationships and understanding. It will be important to work through the re-established Strategic Partnership on this to ensure wider partnership ownership, build capacity and shared resources.

We also recommend that the council agree clear project governance for the 'honest conversations' project and for allocation of remaining funding. It will be important to engage and co-design the overarching approach with local voluntary, community, faith and business sectors.

18

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Local Government Association company number 11177145 Improvement and Development Agency for Local Government company number 03675577

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As outlined earlier in this report, peers were pleased to meet with resident representatives who clearly care for Tamworth and have a passion for their local communities. We encourage the council to consider opportunities to involve these residents, and other resident groups, in this project and ongoing work to build community engagement and community cohesion.

Listening to the views of residents will also be important to help address misinformation and quell rumours that may circulate, particularly on-line. It will be important to link the 'honest conversations' project with the work, referenced earlier in this report, to strengthen communication and consultation. This will help ensure views can be heard and inform the council's responses to issues (e.g. through FAQs). On-going partnership working will also be important to help support and address vulnerabilities amongst young people. This should include maximising partnership working opportunities with Staffordshire County Council through early intervention projects to support community cohesion.

Considering the community leadership role of ward councillors, who know their communities the best, is important. We recommend that consideration is given to the training and development needs for councillors in relation to asset-based community engagement (what it is and how to adopt this approach) and community cohesion. This should build on the existing equalities and diversity training that is already in place. It will also be important to ensure PREVENT and supporting vulnerable people is included as part of internal safeguarding training.

During the peer challenge, we heard how on-line rumours and misinformation, particularly via social media, may have had a part in fuelling some of the violent disorder referenced above. LGA guidance on this is due to be issued imminently and we recommend that the council use this as you progress work on community cohesion.

It will also be important to consider any new national cohesion strategy (at the time of writing, we are anticipating a new strategy next year), along with the outcome of the Home Office's 'rapid review' of counter-extremism. We also understand that the latter will be used to inform the development of a new national strategy.

5.3 Governance and culture

The senior managerial and political leadership are working well together; peers observed good joint working between senior officers and cabinet members. We met with the Cabinet who appeared cohesive and enthusiastic with a diverse range of skills and experiences. Officers from the Corporate and Executive Leadership Teams have extensive experience and knowledge of Tamworth. We heard from senior officers who told us that they are working well together as a unified team. Staff who met with peers are clearly dedicated, passionate and committed to Tamworth as a place and as a council.

Alongside the development of the new draft Corporate Plan, work is taking place to review organisational values/behaviours to ensure residents and communities remain at the heart of all the council does. The peer team heard this referred to internally as ‘the auntie test’; with officers encouraged to think about how they would like their close family members to experience interactions with the council. It is important that the council continues to engage officers on the emerging new values and behaviours. We understand that a staff survey and staff conference are being planned as part of this.

As the council moves forward with its new ambitions around being a more innovative, accessible, visible and data driven council, ongoing engagement with staff at all levels of the organisation will be critical. This includes engagement on future ways of working to ensure the right mix between the application of home working policies and office working policies to meet future ambitions and priorities. This is explored more in section 5.5.

Peers considered the External Auditor’s Report for 2022/2023 and were pleased to see that the auditor anticipates an unmodified audit opinion on the council’s financial statements. For 2023/2024, the audit of the financial statements is nearing completion and, subject to the satisfactory resolution of some requests for further information, the external auditor also anticipates issuing an unmodified audit opinion.

The external auditor’s opinion on the council’s Value for Money arrangements is complete for 2022/2023. Although some improvement recommendations are made, no risks of significant weakness are identified. A more recent report for 2023/2024,

20

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shared with the audit and governance committee in November 2024, also indicates that no significant weaknesses have been identified, with more details to be included as part of the Auditor's Annual Report.

The council hosts a shared internal Audit service with a neighbouring council. We heard from officers that this is well established, and that the arrangement was renewed in October 2023 for a further two years. We did hear of some challenges associated with internal officer capacity. The council should consider, ahead of October 2025 when the arrangement is due to be renewed, reviewing this shared service to ensure that it continues to provide the internal audit capacity, expertise and resilience required.

The peer challenge team were presented with examples of strong corporate governance and assurance processes, including the Member Development Plan, Whistle Blowing Policy and Complaints Policy. We were pleased to see how the Corporate Risk Register is shared on a quarterly basis with the Audit and Governance Committee, Corporate Management Team, Cabinet and Overview and Scrutiny Committee.

The Annual Governance Statement and Code of Corporate Governance for 2023/2024 were also shared with the peer team. Financial sustainability, the re-profiling of capital schemes and Welfare Reform are identified as significant issues. Looking ahead, we would encourage the council to consider housing compliance issues when developing the next AGS for 2024/2025.

It is important that the council continues its work to strengthen a culture of good governance and assurance across the council. We recommend that the council's Member Development Plan incorporates training on audit and governance for all councillors, in addition to bespoke training for members of the Audit and Governance Committee. This will help to ensure assurance and governance are seen as everyone's responsibility. The council should also continue its efforts to recruit external members to the council's Audit and Governance Committee.

In October 2024, the Executive Director Finance post (statutory section 151 officer position) became vacant. It is positive that the council's chief executive acted quickly

to cover this key post with an interim appointment for the next six months (internal) and will recruit to the permanent position after this.

During the Corporate Peer Challenge, the peer team were pleased to hear how the Executive Leadership Team, comprising of the three Executive Directors and chief executive, meet on a weekly basis. The Corporate Management Team, comprising of Assistant Directors, also meet on a regular basis.

The council's statutory officer roles, alongside the chief executive, are critical and influential positions within the council with collective responsibility for governance. Work to review how these officers work together and where in the organisation the roles sit, should be in line with the latest Lawyers in Local Government (LLG), Chartered Institute of Public Finance Accountants (CIPFA) and Society of Local Authority Chief Executives (SOLACE) guidelines.

As referenced above, the council's Member Induction and training timetable for 2024/2025 was shared with the peer team. We heard of some challenges with participation levels. It will be important to continue to work with all group leaders to encourage greater participation.

The council has three overview and scrutiny committees: Corporate, Health and Wellbeing and Infrastructure, Safety and Growth. As the council progresses the development of the new Corporate Plan, there are opportunities, working with scrutiny chairs and members, to review the overview and scrutiny structures and ensure they align to the new agreed priorities. We heard particularly that there may be opportunities to review the Health and Wellbeing committee to give it a greater focus on community wellbeing and community cohesion.

5.4 Financial planning and management

The council faces significant financial challenges with the Medium-Term Financial Plan showing a deficit that increases from £3.3m in 2025/2026 to £5.0m in 2028/2029. The council is currently relying on reserves and balances to meet the gap and have made slow progress in delivering the required level savings to date.

The current level of useable reserves appears healthy, including £30.9m in general

fund balances at the end of March 2024. LG Inform benchmarking data¹ shows how the council's reserves as a percentage of service spend are the above the average of their nearest statistical neighbours for 2023/2024. Furthermore, in 2022/23 there was a general fund revenue underspend of £3,309,000 which was mainly due to an over-achievement of income from treasury management interest and dividends. It is the view of peers that these healthy cash balances and interest received are potentially hiding the true position.

The current projected reliance on reserves to achieve a balanced budget is unsustainable in the medium and longer term. By 2027/2028, there are insufficient balances remaining and by 2028/2029 there is a projected £9m shortfall.

We were pleased, from the conversations we had with senior officers and cabinet members, that the scale of this financial challenge is well understood. We heard from the political leadership that there is a willingness to take tough decisions. This includes a decision, in August 2024, to increase garden waste charges for the first time since fees were introduced in 2017.

In June 2024 the council approved a Financial Stability Plan, alongside its Productivity Plan, aimed at addressing the 2025/2026 budget deficit and future budget pressures. The Plan aims to reduce the use of General Fund Balances between 2025/2026 and 2027/2028 and set a balanced budget without the use of reserves by this point.

Whilst this is a positive step, it is the view of the peer team that the current areas for targeted savings appear aspirational rather than tangible and deliverable. We recommend that the council quickly/urgently develops a clear savings plan incorporating tangible, costed and deliverable savings at pace, with robust senior management and member oversight. This should be treated as a key priority as the time to act is now.

The council's Annual Governance Statement (AGS) for 2023/2024 highlights the need to closely monitor slippage in capital spend, including Future High Street Fund, and ensure schemes are managed in accordance with agreed funding criteria. It shows re-profiling of capital scheme spending from 2022/23 into 2023/2024 and from

23

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2023/2024 to 2024/2025. It will be important to ensure this is closely monitored through the Asset Strategy Steering Group.

The Council's long-term assets, valued at £327m in March 2024, comprise of some extensive liabilities, including £20million of investment properties, £13million of long-term debtors and £10million of long-term investments. The council has updated a draft Asset Management Strategy for 2024/2025 (at the time of writing, this was going through scrutiny/decision making processes). It is important that the council ensures this Strategy, and associated Asset Management Plans, are progressed at pace so that the council is confident that it is able to exercise responsible ownership, manage risk and exercise control over the asset base. This will involve the need to take some clear decisions on the future of key assets.

The peer team met with officers from the finance team who are clearly experienced and well respected. We found prudent assumptions are built into the budget setting process. We were also pleased to see how regular quarterly monitoring reports are shared with Corporate Management Team and published as part of quarterly performance reports to both the Cabinet and Overview and Scrutiny committee. As outlined in section 5.3 of this report, the external auditor has not identified any weaknesses in arrangements.

As outlined in section 5.1, the council is a stock holding authority with a Housing Revenue Account (HRA). Quarter One monitoring shows how this is projected to be in a surplus position over the next five years. Balances are projected to be £6.1m at the end of 2026/27 and £9.6m by the end of 2028/2029. However, the capital programme is dependent on using earmarked reserves which is not sustainable in the long-term. Maintaining focus on monitoring and managing the costs of the capital programme included in the thirty-year HRA business plan will be critical.

Tamworth Council is not currently experiencing some of the significant financial pressures associated with costs of temporary accommodation that many other councils face. The latest LG Inform benchmarking data shows Tamworth has lower than average number of households in temporary accommodation compared to statistical neighbours. The council should consider how to share their learning and approaches in relation to this with sector colleagues.

24

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5.5 Capacity for improvement

As outlined in section 5.3 of this report, staff are dedicated, passionate and committed to Tamworth as a place and as a council. From the conversations we had with a range of staff, they recognise their roles in relation to the new emerging corporate plan, they value on-going engagement on this, are open to change and recognise that transformation is needed.

A People and Organisational Strategy, alongside an Action Plan, was agreed in January 2023. This sets out eight thematic areas of focus aimed at ensuring Tamworth is an Employer of Choice. We understand this Strategy, which expires in 2025, will be subject to review and development. This review should be aligned to the council's new (emerging) corporate priorities and transformation ambitions. It is important that staff are supported to develop any new skills required and that the council is able to attract and retain new talent in support of their ambitions.

The council has a small workforce with many loyal and long serving staff. Succession planning is included as a thematic area in the Workforce Strategy, but the council's position statement shows that the approach to date has been informal and unstructured. It is positive that the council are seeking to address this through the development of a new succession planning policy focussed on development opportunities for existing employees.

In the context of the global pandemic in 2020, and similar to other councils, the council has moved towards agile working. Over 220 employees are home or hybrid workers (out of a workforce of 386 staff, or 334.08 full time equivalent) with the remainder being site workers.

The latest staff survey was focussed on the theme of agile working (the council refer to this as SMART working). Conducted in December 2022, it shows how staff welcome the agile working approach, with 64 per cent of respondents saying that it has helped create a better work life balance. However, the results also identify some challenges around internal communication including perceptions about accessibility of some teams. It is positive that the leadership team have acted on these findings through the implementation of an agreed action plan. It will be important to keep this under review.

25

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During the peer challenge, we heard of examples of strong cross service/team working. But we also heard of challenges associated with silo working. We also picked up some mixed views and understanding about the home/hybrid working contracts in place at the council. In particular, if a 'twice monthly' contractual attendance at Marmion House/other site location for some staff is a maximum or minimum and the flexibility attached to this.

We recommend that the council engage staff, customers and residents to review the current approach to agile working. This is in the context of the emerging new Corporate Plan priorities which include an enhanced focus on the council being 'visible, approachable and accountable'. It is also in the context of the recent re-opening of a face-to-face customer service reception at Marmion House. The council needs to be satisfied that it has struck the right balance between home working and office working, face-to-face customer contact and digital and telephone customer access. Ways of working need to enable delivery of the council's agreed priorities, meet customer needs and deliver improved outcomes for residents.

Given the scale of the financial challenges faced (outlined in more detail in section 5.4), progressing digital and service transformation to boost capacity, deliver efficiencies and achieve savings will be critical. It is positive that the council recognise the need for this and have identified this within the Financial Stability Plan referenced in section 5.4.

We recommend that the council develops a clear vision and priorities for digital and service transformation through the development of a comprehensive Plan. This should build on the work already undertaken through the current ICT Strategy which expires in 2025.

The council's position statement highlights the council's digitalisation journey to date through the existing ICT strategy. It shows how there is more work to do to grow digital transformation across a range of areas including customer contact, back office, use of data/intelligence and ICT infrastructure. It will be important to ensure that the council's ICT services have the capacity and capability to support the council's digital and service transformation ambitions.

26

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A key part of this approach will be to ensure the council's organisational structure aligns to the delivery of its agreed priorities and transformation ambitions. We recommend that you review the organisational structure and, as identified above, future ways of working in support of agreed priorities. The aim should be to ensure that there is sufficient capacity and resource to deliver the agreed priorities, achieve efficiencies and deliver services that meet the needs of residents.

The development of a comprehensive plan for digital and service transformation will help to guide investment decisions. This includes the future use of key assets such as Marmion House. It also includes investment in digital technologies. Prioritisation, pace of change and sequencing will be key. It will also be important to ensure ongoing engagement of residents, staff and councillors and bring these with you on your journey. Ensuring strong governance and oversight for service and digital transformation should be considered.

6. Next steps

It is recognised that senior political and managerial leadership will want to consider, discuss and reflect on these findings. The LGA will continue to provide on-going support to the council.

The council should publish this report no later than three months of the Corporate Peer Challenge (CPC). The council should also develop and publish an Action Plan showing how the recommendations within this report will be implemented. This Action Plan should be published no later than five months after the CPC.

As part of the CPC, the council are also required to have a Progress Review and publish the findings from this within twelve months of the CPC. The LGA will also publish the progress review report on their website.

The progress review will provide space for a council's senior leadership to report to peers on the progress made against each of the CPC's recommendations, discuss early impact or learning and receive feedback on the implementation of the CPC Action Plan. The progress review will usually be delivered on-site over one day.

In the meantime, Helen.Murray@local.gov.uk, Principal Adviser for the West

27


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Midlands, is the main contact between your authority and the Local Government Association. As outlined above, Helen Murray is available to discuss any further support the council requires.

ⁱ LG Inform is the Local Government's benchmarking tool for councils

Corporate Peer Challenge Action Plan – Draft v 1.3

Appendix 2

Foreword

In October 2024, over a three-day period, we had the privilege of inviting the Local Government Association (LGA) to undertake a thorough review of our performance through a process known as a ‘peer challenge.’ Led by Rebecca Huddleston, Chief Executive of Wyre Council, Councillor Alan Rhodes, Cabinet Member for Corporate and Financial Services at Bassetlaw District Council, and Councillor Nick Worth, Leader of South Holland District Council, alongside four other experienced local government professionals, this challenge provided us with invaluable external insights.

Peer challenges are an established and voluntary tool used by local councils to drive improvements and enhance efficiency across key areas such as finance, communications, health and wellbeing, equalities, housing, planning, and beyond. While not mandatory, this process presents a unique opportunity to receive constructive feedback from colleagues in local government. Our LGA peer challenge was both timely and welcomed, offering us a critical opportunity to gain an objective assessment of our progress and to help guide our future direction.

We invited the peer challenge team to scrutinise our intentions, approaches, ambitions, and plans for delivery. While we acknowledge the significant challenges facing Tamworth, we also recognise the exciting potential for growth and transformation. We view this peer challenge not only as an external evaluation but as an essential tool for refining our approach and strengthening our resolve. The feedback received is instrumental in shaping the next phase of our journey, making sure we continue to evolve as a council that delivers more for the people of Tamworth.

During their visit, the peer challenge team was struck by the immense pride held by our staff, members, residents, and stakeholders, particularly in relation to Tamworth’s rich history and unique heritage. This sense of pride forms the foundation of our ambitions, as we seek to build on our past while focusing on key priorities for the future. These include driving forward digital transformation, fostering innovation, enhancing visibility, advancing equalities, promoting community wellbeing and cohesion, and delivering excellent services. We are also committed to continuing the major regeneration projects that are reshaping our town centre.

While we face considerable financial challenges in the months and years ahead, the peer challenge has helped us to better align our limited resources with the areas that will underpin our long-term financial resilience and responsibility. In response, we will review our organisational structures and governance frameworks to make sure they are fit for purpose, transparent, and provide confidence in our plans. Strengthening our communication and consultation strategies will also be a priority, making sure we effectively engage with our stakeholders.

The peer challenge team has made several thoughtful suggestions for improvement. This action plan has been developed in direct response to these recommendations, to address the key points raised and continue to build a stronger, more effective council for the future.

Cllr. Carol Dean, Leader of the Council & Stephen Gabriel, Chief Executive

Introduction

The council would like to express its sincere gratitude to the peer challenge team and the Local Government Association (LGA) for their time, insights, and thoughtful recommendations. We fully recognise and agree with the feedback provided.

Like many councils, Tamworth is currently navigating a particularly challenging budget-setting process, which demands considerable time and capacity from senior staff across all areas. In this context, the council must balance finite resources across competing pressures and priorities, making sure we address immediate challenges while continuing to deliver for our residents. As a result, some recommendations may not be implemented immediately and will be actioned once we move past this critical period of financial and strategic planning.

However, this delay should not be interpreted as a lack of importance placed on the corporate peer challenge process or its recommendations. In fact, we are already taking steps on several of the suggestions put forward, as outlined in this action plan. The timing of certain actions reflects the current limitations on our capacity, given the intense financial pressures we are facing.

The council is committed to making sure that any actions taken result in lasting, positive change for both the organisation and the borough. We are eager to work collaboratively with staff, councillors, partners and the community to bring these recommendations to life and make meaningful progress toward our shared goals.

Delivering the plan

Our work on action planning began as soon as the peer team delivered their recommendations. The outline recommendations from the corporate peer challenge can be described under three broad themes. We are using these as workstreams for action planning and reporting:

- 1. *Financial resilience***
- 2. *Engagement and service delivery***
- 3. *Organisational capacity and governance***

Many of the recommendations relate to work already underway. The council is taking a streamlined and pragmatic approach to delivering and monitoring this action plan, utilising existing teams and governance wherever possible.

Where existing work programmes are in place, leads have been asked to review plans utilising the peer challenge feedback. They will outline the changes to be made and accelerate specific outcomes which relate to the recommendations.

Programme governance will be established in line with best practice. Reporting on the specific peer challenge action plan will be to the council's corporate management team and the executive leadership group, with an update due to Cabinet in August 2025. By September 2025, the Local Government Association will organise a progress review visit. This will create space for the council to explore progress and challenges with peers and discuss next steps.

Measures of success

- Medium-Term Financial Strategy (MTFS) complete and aligned with the corporate plan
- Updated Housing Revenue Account business plan

- Establish and initiate the transformation plan for next two-three years
- Publish and adopt the asset management strategy with fully costed asset management plans
- Updated long-term capital strategy
- Equality, diversity and inclusion strategy in place with clear monitoring measures in place
- Social housing improvement programme complete and communicated
- Develop a council wide communications and engagement strategy
- Develop a town centre regeneration strategy
- Develop a community cohesion strategy with associated action plan
- Update the people and organisational development strategy
- Succession planning policy in place
- SMART working review complete
- Updated constitution
- Updated terms of reference for overview and scrutiny committees
- Updated member training offer with actions to increase attendance
- Updated ICT strategy and core project/programme methodologies to support

BRAGG key: **Blue** – ahead of schedule, **Red** – At risk of non-delivery, **Amber** – delayed or on hold, **Green** – on target, **Grey** – not started

No	Recommendation	Report detail	Existing Activities to support this	New Actions	Lead	Target date	Progress (BRAGG)
Financial Resilience							
1	Develop a clear plan to address your financial challenges incorporating tangible, costed and deliverable savings with robust governance oversight.	Develop a clear savings plan incorporating tangible, costed and deliverable savings with strong political and managerial leadership and oversight. Solidify a realistic plan for delivering the financial savings to close the funding gap and managing risks. Savings targets to be specific and measured.	Financial Resilience Strategy and Productivity Plan approved in July 2025	Create a financial resilience programme to deliver the delivery of 2025/2026 budget which includes measurable targets for delivery and track via a savings tracker	Executive Director Finance	February 2025	
2	Align your financial plans to your emerging new corporate plan	Finalise the new corporate plan and priorities in collaboration with residents and key partners.	Corporate Plan drafted and in consultation since August 2024	Use the budget process to finalise the corporate plan aligned to the Medium-Term Financial Strategy (MTFS)	Assistant Director Policy and Performance	February 2025	
		More precision and focus on priorities. Review the quarterly report template to be	New Assistant Director post appointed to	Create a corporate plan programme for the five years including a revised	Assistant Director Policy and Performance	April 2025	

		succinct/user friendly and strengthen the use of benchmarking data.	progress this work,	performance management framework to track corporate indicators against the delivery of priorities.			
3	Ensure you are fully meeting obligations, managing risk, and exercising control over the asset base and investments.	Exercise responsible ownership, manage risk and exercise control over the asset base. This will involve the need to take some clear decisions on the future of key assets.	Asset Management Strategy Approved in Autumn 2024. Work to progress Asset Plans underway.	Bring forward costed asset management plans developed.	Assistant Director Assets	October 2025	
		Make sure capital schemes are managed in accordance with agreed funding criteria and close monitoring by the asset strategy steering group. Maintain focus on monitoring and managing the costs of the capital programme included in the thirty-year housing revenue account business plan.	Steering Group Established and meeting regularly to oversee. Review of Housing Revenue Account (HRA) in progress as part of the MTFS	Review and strengthen monitoring and reporting activity of the asset strategy group. HRA Business Plan update completed.	Executive Director Finance	April 2025	
Engagement and Service Delivery							

4	Ensure the new equality, diversity and inclusion strategy is used to bring to life a common vision and a sense of belonging for all communities, staff and councillors.	Lead and commit to this work to help embed equality, diversity and inclusion principles across everything the council does, including work to strengthen community cohesion. Use the new equality, diversity and inclusion strategy to help bring to life a common vision and sense of belonging for all communities, staff and councillors.	Equality Strategy developed and consulted. Approved in December 2024	Deliver new equality, diversity and inclusion strategy Training of all staff and members Equality, diversity and inclusion steering group created and meets regularly to oversee achievement of strategy objectives	Assistant Director People	January 2025 April 2025 February 2025	
5	Continue to deliver the social housing improvement programme, working with residents and the Regulator for Social Housing	Maintain focus and drive on our improvement journey. Continue to engage with residents to develop the plan.	Social Housing Regulatory Programme developed, immediate actions addressed and root causes identified	Finalise and deliver recovery action plan Social housing improvement programme communication and engagement plan in place.	Executive Director Communities	April 2025	
6	Review communication and consultation approaches.	Develop an overarching communications and engagement strategy. This should help to further strengthen closer engagement with communities.	LGA Review of Comms undertaken in 2023. Clear communication protocols in place.	Develop a council wide communications and engagement strategy.	Assistant Director People	April 2025	

		Use the outcome of the 'honest conversations' project to inform approaches. It should include a set of principles to underpin future consultation and engagement, and an overarching strategy to build more consistent, planned, timely, genuine and accessible approaches.	Plain English training rolled out in Autumn 2024.				
7	Develop your overarching town centre master plan and use this as an opportunity to strengthen communication approaches in relation to town centre regeneration	Work outlined above to strengthen communication and consultation approaches includes town centre regeneration. It will also be important to continue work, already started, to bring together recent and planned developments to formulate a single town centre master plan.	Transforming Tamworth project website live and updated Various studies commissioned to develop an evidence base to the town centre use Future high streets fund project board established with communication plans in place	Develop a town centre regeneration strategy - which will guide the town centre regeneration. Including communications and consultation.	Assistant Director Growth & Regeneration	April 2025	

		Maintain focus on the timeline for the development of the new Local Plan (2022 – 2043) as a key document to guide future regeneration and development in the borough.	Paper to approve the timeline for development presented in June 2024 with options	Deliver the agreed Local Plan timeline.	Assistant Director Growth & Regeneration	Submission Dec 2026	
8	Use the 'honest conversations project to build asset-based approaches to your work in communities and inform your community cohesion plan.	Inform work to build asset-based community engagement and strengthen community cohesion through the development of a new 'strengths based' community cohesion strategy and action plan for Tamworth.	Honest Conversations project commissioned and due to report in February	Develop a 'strengths based' community cohesion strategy and action plan. Include as part of Tamworth strategic partnership action plan.	Assistant Director Partnerships	Cabinet April 2025 Action Plan by July 2025 Develop strategy timeline by July 2025	
		Take account of the new national cohesion strategy (due in 2025), along with the outcome of the Home Office's 'rapid review' of counter-extremism.	Awaiting government advice on date of release to build into plans	Build in a review and plan for updated national guidance.	Assistant Director Partnerships	Develop strategy timeline by July 2025	
Organisational capacity and governance							

9	Ensure your organisational structure aligns to your priorities and ambitions.	Review organisational structure and future ways of working in support of priorities, making sure there is sufficient capacity and resource to deliver the agreed priorities, achieve efficiencies and deliver services that meet the needs of residents.	Organisational Development and Workforce Strategy Approved January 2023	Undertake discovery for a new organisational structure aligned to the new corporate plan priorities.	Executive Director Organisation	February 2025	
		Make sure there is sufficient capacity and resource to deliver against agreed priorities.	New Assistant Director role to support	Reassess resources available to each priority area and set key milestones for delivery.	Assistant Director Policy and Performance	March 2025	
		Align the council's new priorities and transformation ambitions to make sure staff are supported to develop new skills. Including work to attract and retain new talent.	Organisational Development and Workforce Strategy Approved January 2023	Update the people and organisational development strategy.	Assistant Director People	March 2025	
		Succession planning has been informal and unstructured, needs focus on development	Organisational Development and Workforce Strategy	Develop a succession planning policy.	Assistant Director People	March 2025	

		opportunities for existing employees.	Approved January 2023				
		Engage staff, customers and residents to review the current approach to agile working.		Review SMART working arrangements.	Executive Director Organisation	October 2025	
10	Strengthen the culture of assurance and good governance across the council, including how statutory officer functions work and are distributed across the authority.	Strengthen how the statutory officers of the council (head of paid service, section 151 officer and monitoring officer) work together to ensure a voice in all decision making.	Statutory Officers meet formally on a regular basis	Review statutory officer roles.	Chief Executive	May 2025	
		Continue to work to strengthen the culture of assurance and good governance across the council to make sure it is seen as everyone's responsibility. Audit and risk management culture to be embedded, for everyone to contribute. This should include training on audit and	Comprehensive member training in place including mandatory training for key committees	Increased training and awareness of audit and risk management.	Executive Director Finance	June 2025	

		governance for all councillors.					
		Review shared service to ensure capacity, expertise and resilience of internal audit.	Annual reviews are set out in the contract.	Review shared service to ensure capacity in advance of contract renewal.	Executive Director Finance	October 2025	
		Permanently appoint to the statutory section 151 officer position.		Recruit permanent S151 Officer	Chief Executive	May 2025	
11	Review the council's overview and scrutiny structures in support of your corporate priorities.	Review the health and wellbeing overview and scrutiny committee, to see a greater focus on community wellbeing and cohesion.	Annual review of constitution	Review constitution and terms of reference for the overview and scrutiny committees to align with corporate priorities.	Monitoring Officer	May 2025	
12	Develop a comprehensive plan to achieve digital transformation, putting customers at the heart.	A clear plan to address the ambition to strengthen digital transformation of council services. To be aligned to the new corporate plan priorities.	ICT Strategy 2022 to 2025 in place	Update ICT/digital strategy.	Assistant Director People	April 2025	
		Make sure there is sufficient capacity and resource to achieve	ICT Strategy 2022 to 2025 in place	Look closely at all use cases and prioritise those which	Assistant Director People	July 2025	

		digital transformation that delivers innovative, efficient and effective service delivery to the customers.		add value or reduce costs and significantly enhance customer experience.			
		<p>A comprehensive plan for digital and service transformation will help to guide investment decisions. This includes the future use of key assets such as Marmion House and digital technologies.</p> <p>Prioritisation, pace of change and sequencing will be key. It will also be important to see ongoing engagement with residents, staff and councillors and bring these on the journey.</p>	ICT Strategy 2022 to 2025 in place	Update ICT/ digital strategy and develop a prioritised implementation plan to be monitored by the corporate projects programme and supported by the financial resilience plan.	Assistant Director People	July 2025	
		Ensuring strong governance and oversight for service and digital transformation should be considered.		Corporate project/programme governance model established.	Assistant Director Policy and Performance	Feb 2025	

Equality, Social Inclusion and Health Impact Assessment (ESHIA)

An ESHIA is a review of a new or existing policy, strategy, project, report or service change to establish whether this has a differential impact on specific equality groups and identifies how we can improve equality of opportunity for different groups of people.

An ESHIA aims at improving Tamworth Borough Council's work, by promoting equality, social inclusion, health and wellbeing by ensuring that the proposed or existing policy promotes equality and can benefit a wide range of people.

Details

Title of the proposal	Corporate Peer Review report and draft action plan	
Director responsible for the project or service area	Executive Director Organisation	
Officer completing the assessment	Christie Tims	
Date conducted	14 January 2025	
Who are the main stakeholders?	Executive Leadership team, Cabinet, Statutory officers, Corporate Management team Will also extend to: <ul style="list-style-type: none"> • Residents • Business • Staff Team • Elected Members • Registered social landlords • County Council • Partner Authorities – South Staffs, Lichfield and North Warks • NHS, ICB and health providers • Key suppliers/contractors • Voluntary sector 	
What is being assessed?	A decision to review or change a service	
	A strategy, policy, report or procedure	x
	A function, service, or project	
What kind of assessment is it?	New	x
	Review of existing	

Part One - Initial screening:

This section should be used to carry out an initial screening of changes or decisions to help to decide whether a full ESHIA is required.

The following six screening questions are designed to assess whether this proposed change is likely to have an impact on equality, social inclusion, health and wellbeing.

		Yes	No
1	Does this new or revised project, proposal, policy, report, procedure likely to have an impact?	x	
2	Does the proposal seek agreement to a key decision involving allocation of resources, such as changes in funding or resources, initiation of a new programme or project or procurement?		x
3	Does the proposal seek agreement on restructuring or reorganising of staffing?		x
4	Will this policy or proposed change have any impact on potential suppliers?		x
5	Does this policy or proposed change impact on any HR policy or practice within the council?	x	
6	Does this policy or proposed change have any implications for equalities, social inclusion and health and wellbeing not covered above?	x	

1. If the answer is **no** to all the questions, please provide a summary below outlining why this conclusion has been reached.
2. If the answer is **yes** to any of the questions, please conduct the full ESHIA as detailed in Part two.

If you are unsure of any of the answers, please seek advice from Human Resources.

Summary of initial screening outcome:

Decision	Yes	No
Initial screening only	x	
Proceed to Part Two, full assessment		

Initial screening completed by	Christie Tims
Date	14.1.25

Full screening completed by	Christie Tims
Date	14.1.25

Equality, Social Inclusion and Health Impact Assessment (ESHIA)

Part Two: Full assessment

Section 1

The purpose of the project, proposal or decision required. Set out the aims, objectives, purpose and outcomes of the area being impact assessed. Are any other functions, policies or services linked to this assessment?

Corporate peer challenge is a Sector Led Improvement process offered by the LGA and funded by Government as part of Best Value duty. All key partners and groups impacted by the work of the Council have invited to be involved as part of the review process in October and will be made aware of the recommendations and action plan the Council will deliver to meet them.

The action plan will have far reaching implications in terms of the documents and actions that will be developed to address key strategic challenges for the council. However the draft action plan does not authorise any policy or strategy to be agreed without following normal approval routes and being subject to further ESHIA. These include:

- New corporate plan 2025-2030
- Medium Term Financial Strategy
- Equality and Diversity Strategy
- Financial Stability Plan
- Performance Management Framework
- Asset Strategy and Management Plans
- SMART Working Framework
- Organisational Development and Workforce Strategy
- ICT Strategy/Digital Transformation Strategy
- Asset Based Community Development plan/Community Cohesion work
- Social Housing Improvement Programme

Section 2

Evidence used and considered. Include analysis of any missing data.

A strategic assessment has been prepared and a position statement and key data reports were provided to the review team to undertake the review. They held over 30 meetings with 70 attendees in the 3 day on site visit. The findings have been reviewed and quality assured by the Local Government Association to ensure they meet the Best Value framework and are valid judgements.

Section 3

Consultation undertaken with interested parties who will/may be affected proposal? What were the outcomes of the consultation?

Key officers have been consulted to ensure timelines in the plan are realistic to deliver the actions outlined.

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Section 4

What are the potential or actual impacts of the proposal? Please consider both the direct and indirect impact and refer to the guidance for additional information.

Impact Area	Impact? Positive (P) Negative (N) Neutral (Ne)	Details of the impact	Action to address negative impact
Protected Characteristic, as outlined in the Equality Act 2010			
Age	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Disability	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Gender reassignment	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Marriage and civil partnership	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Pregnancy and maternity	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Race	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Religion or Belief	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Sex	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Sexual Orientation	Neutral		The plan will ensure all residents with protected characteristics are informed and can engage in their community and with the Council.
Are there socio-economic groups likely to affected? If yes, please provide detail below			

Other social exclusion	Neutral		The plan will ensure all residents from socio-economic groups are informed and can engage in their community and with the Council.
Digital exclusion	Neutral		The plan will ensure all residents from socio-economic groups are informed and can engage in their community and with the Council.
Veterans and serving members of the armed forces and their families	Neutral		The plan will ensure all residents from socio-economic groups are informed and can engage in their community and with the Council.
Young people leaving care	Neutral		The plan will ensure all residents from socio-economic groups are informed and can engage in their community and with the Council.
Health and Wellbeing: Individuals and communities in Tamworth	Impact: Positive (P) Negative (N) Neutral (Ne)	Explanation	Action to address negative impact
Will the proposal have a direct impact on an individual's health, mental health and wellbeing?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will the proposal directly impact on housing?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be a likely change in demand for or access to public services such as health and social care services?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be an impact on diet and nutrition?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be an impact on physical activity?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.

Will there be an impact on transport, travel and connectivity?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be an impact on employment and income?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be an impact on education and skills?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be an impact on community safety?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.
Will there be an impact on the environment, air quality, climate change?	Neutral		The plan will ensure all residents with health and wellbeing needs are informed and can engage in their community and with the Council.

If there are no adverse impacts or any issues of concern or you can adequately explain or justify them, please move to section 6.

Section 5

Where a potential negative impact has been identified, can continuation of the proposal be objectively justified? If yes, please explain your reasons.

At this stage negative impacts are not anticipated, however further ESHIA will be carried out for each action in the plan as are as they are undertaken

Section 6: Decisions or actions proposed

The assessment may result in some recommendations or suggestions to mitigate any negative impact and maximise positive impacts or actions to reduce the risk of an adverse impact.

n/a

Section 7: Monitoring arrangements

Who will be responsible for monitoring	Corporate Projects Programme Board
Frequency of monitoring	monthly
Where will the impact assessment be reported to?	Cabinet as part of QPR
Where this impact assessment will be stored and for how long	The plan will last for up to 2 years and should be retained for review at next CPC in 5 years.

Section 8: Summary of actions to mitigate negative impact (if required)

Impact Area	Action required	Lead officer/responsible person	Target date	Progress

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Corporate Scrutiny

Thursday, 6 February 2025

Report of the Leader of the Council

Corporate Plan 2025 - 2030

Purpose

To advise members of the consultation responses that have supported the development of the priorities of the Corporate Plan 2025 to 2030 and advise on the development of the draft Annual Delivery Plan which will support these being achieved.

Recommendations

It is recommended that:

1. Scrutiny review and comment on the new Corporate Plan 2025-2030 (Appendix A)
2. Scrutiny review and comment on the Scrutiny review and comment on the updated performance management framework and the plan for quarterly reporting going forward. This includes the draft template for the Annual Delivery Plan (Appendix B) to be used to develop the framework for assessing the progress to deliver the priorities from the Corporate Plan 2025-2030.
3. Scrutiny notes the outcomes from consultation and engagement set out in Appendix C that have been used in the refinement of the final Corporate Plan.

Executive Summary

The Corporate Plan 2025 - 2030 sets out the council's vision and priorities and has been in development since June 2024. The development of the plan has been shaped by consultation and collaboration with residents, staff, members, community groups and key strategic partners to ensure it reflects the needs and expectations of our residents.

It is an integral part of our Medium-Term Financial Strategy (MTFS) to ensure its viability and deliverability. As such the Corporate Plan itself forms an integral part of the budget report which will be presented for discussion at Cabinet on 20 February 2025 and for adoption at Full Council on 25 February 2025.

The Vision for the Council is to *Build a Better Tamworth by delivering our key priorities:*

Prosperity & Place - We want growth in the local economy by creating jobs and a Tamworth we are all proud of, ensuring financial stability for all. We will:

1. Work with businesses to help them grow and create jobs
2. Identify and address skills shortages, including the digital divide
3. Make the town centre more vibrant and accessible
4. Regenerate and create spaces for people to use and enjoy

5. Promote tourism and nightlife by using our culture and heritage sites

Environment - We want to achieve net-zero carbon emissions, protect the environment and enhance local biodiversity. We will:

6. Keep Tamworth's local areas clean
7. Tackle fly tipping, littering and environmental offenses
8. Cut down on using carbon in our operations
9. Collaborate with partners to protect the environment
10. Provide eco-friendly housing options

Community Wellbeing - We want residents to lead safe, healthy and happy lives in communities that are cohesive, where diversity is celebrated. We will:

11. Work with our partners to support children and vulnerable individuals' wellbeing
12. Ensure our active health and wellbeing offer supports residents physical and mental health
13. Improve our offer to provide suitable homes and make good quality, eco-friendly and affordable housing available
14. Work with our partners to reduce homelessness and rough sleeping
15. Work with our partners to reduce crime and help our residents feel safe

Council - We're focused on being a caring, accessible and effective council that is financially resilient. We will:

16. Be visible, accessible, approachable and accountable to the community
17. Learn and work with communities to provide broader social benefits
18. Maintain balanced budgets in our financial strategies

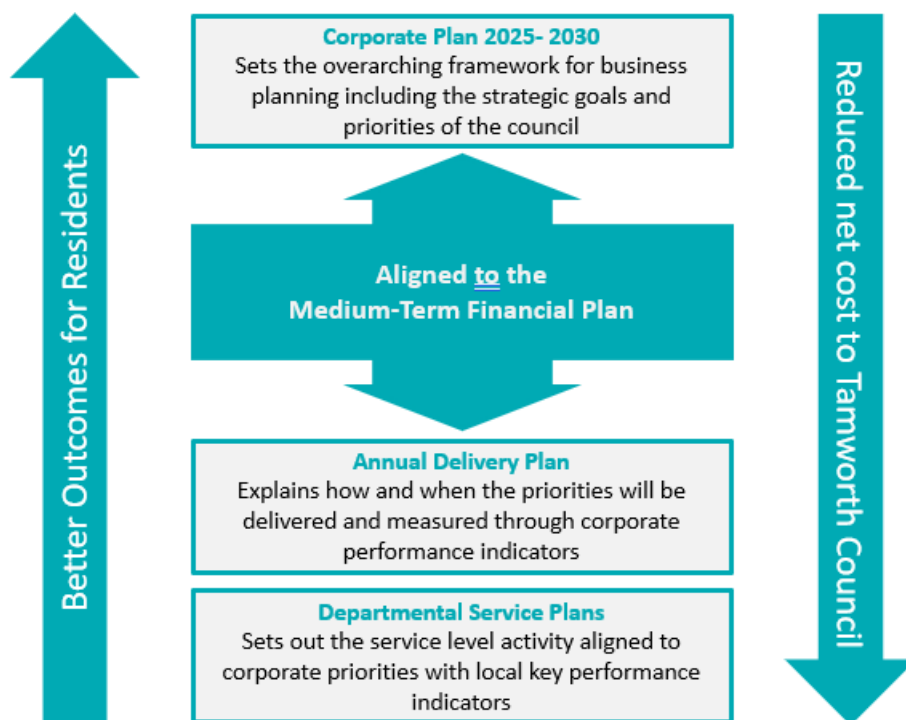
Background Information

The council's new Corporate Plan has been informed by several key elements including:

- The aspirations of the new Cabinet, the council and all members
- The views of residents through regular surveys and specific consultation exercises commissioned in 2024 and the most recent survey in Autumn 2024
- Existing commitments, such as key projects and existing strategies that extend beyond the current plan period.
- The current and future financial situation of the council – the Medium-Term Financial Strategy (MTFS).
- Local statistics that highlight areas of concern/ focus
- Input from statutory and key strategic partners including Better Together Tamworth
- The views of local businesses, voluntary sector and staff

An outline of the emerging plan was presented to Corporate Scrutiny in June 2024 and further in August 2024 on progressing consultation and engagement.

Following these sessions, the draft plan was used to assess budget priorities for the development of the revised MTFS which will be considered at Full Council on 25 February 2025, when the new plan will be adopted as part of the Council Budget as set out in this diagram:



To help us work towards delivering the five-year-long Corporate Plan priorities the Annual Delivery Plan focuses on two areas:

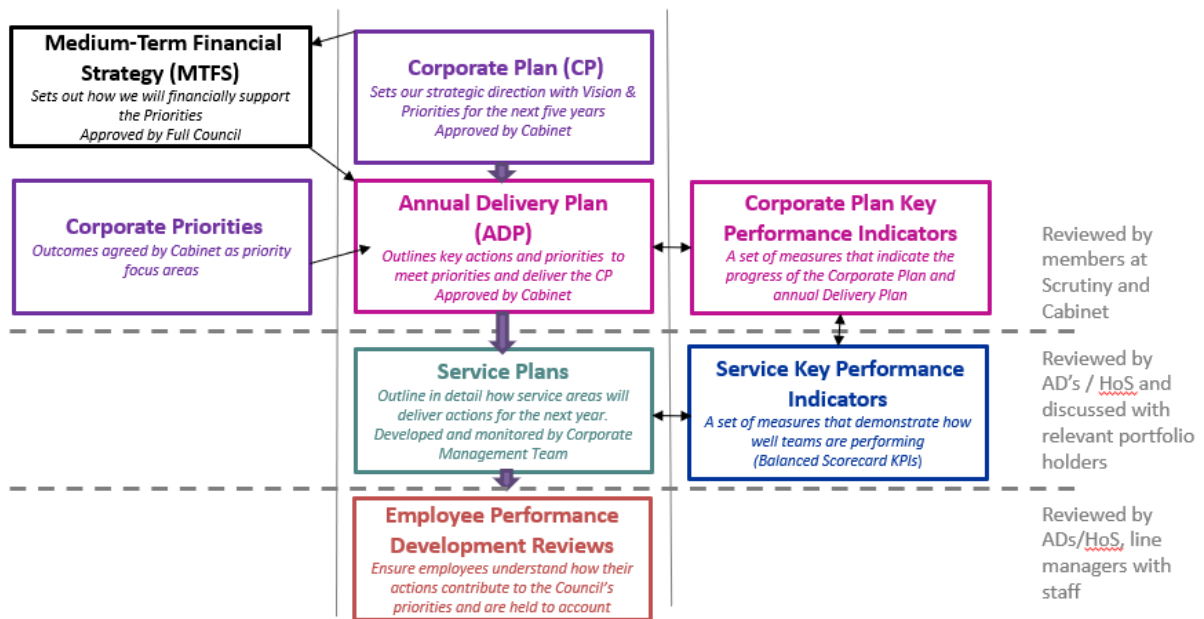
1. Activities the council needs to undertake over the coming year
 - Each activity entails associated milestones that will need to be achieved by the end of March 2026
2. Corporate Key Performance Indicators will enable us to understand the effectiveness of our services including successes and areas for improvement
 - How we compare to other local authorities (CIPFA Benchmarking group)
 - Review which statutory indicators should feature as part of the Corporate KPIs
 - Review best practice, innovations and embed continuous improvement into our practices

Robust monitoring arrangements will be implemented including senior officer and cabinet member oversight. This will help us to be open and honest about our progress, how well we are performing and what mitigations we need to put in place to address slippage and emerging risks. Reporting will include:

- Monthly report to CMT Performance Board
- Monthly update to Portfolio Holders
- Quarterly report to Scrutiny and Cabinet

The new quarterly performance report intends to focus on the council's progress on delivering the Corporate Plan by monitoring the Annual Delivery plan and the corporate KPI's. Reporting of progress against the Corporate Plan will be disaggregated from the quarterly performance pack to provide transparency and focus on our key outcomes.

Our golden thread of corporate priorities will support our updated performance structure of:



Once approved by Cabinet and Full Council a communications plan will ensure the new priorities, values and performance framework are communicated to staff, members and other key stakeholders.

Options Considered

The council must have a Corporate Plan to fulfil the obligations of Best Value. Any such plan must be evidence based, current, realistic and enable the whole organisation's performance to be measured and held to account.

The authority's financial strategy and delivery arrangements must also be aligned with priorities in the Corporate Plan, and respond appropriately to local need, including the plans of partners and stakeholders.

Resource Implications

The Corporate Plan is the key guide for planning and decision making for the council over the next 5 years and careful consideration has been made to align the plan with the council's resources and capacity to deliver, as a key recommendation from the Corporate Peer Challenge Feedback Report.

Legal/Risk Implications Background

None, the plan has been developed in full consultation with key stakeholders and taken through scrutiny in August 2024 and January 2025. Consideration has been made of the recently announced local government devolution and the plan will ensure that until any such decisions are made, the Council will perform and deliver the best outcomes for residents.

Equalities Implications

An Impact Assessment has been completed at Appendix D – No issues have been flagged that are directly relevant to decisions in this report, however it is noted that the consultation

plans included measures to seek views from underrepresented groups and this work is ongoing as part of the community cohesion project. For this reason, equality and inclusion has been included as a key principle of the Corporate Plan and the Annual Delivery Plan. The ESHIA will continue to be reviewed as the activities are developed and approved for delivery.

Environment and Sustainability Implications (including climate change)

Environment is a priority area set out in the Corporate Plan and the Annual Delivery Plan. Supporting actions, projects and policies, that will be subject to their own approval routes, will ensure this is progressed.

Report Author

Anica Goodwin – Executive Director Organisation
Amerdip Kaur – Assistant Director, Policy and Performance
Christie Tims – Corporate Project Co-ordinator

List of Background Papers

Current [Corporate Plan 2022-2025](#)
Statutory [Best Value duty](#)
Cabinet Report [Corporate Plan Development Timeline](#) July 2024
Scrutiny Report [Corporate Project Updates](#) June 2024
Scrutiny Report [Vision and Corporate Plan update](#) August 2024

Appendices

Appendix A – Corporate Plan 2025-2030
Appendix B – Annual Delivery Plan Template
Appendix C – Consultation & Engagement Summary
Appendix D – Equality, Social and Health Impact Assessment Report

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Tamworth Borough Council Corporate Plan 2025 to 2030

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Contents

Foreword	3
Introduction	4
Our Vision and Priorities	6
How we will work	8
Supporting strategies and plans	10
Shared Services – working with other local councils	11

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Foreword by Cllr Carol Dean, Leader of Tamworth Borough Council and Stephen Gabriel, Chief Executive and Returning Officer

We are proud to present our corporate plan for 2025 to 2030 - the strategy which sets out the strategic goals and key priorities to achieve our vision *Building a Better Tamworth*. With a new Chief Executive and recently formed Cabinet and cohort of councillors elected in May 2024, this is our first opportunity to share our long term aims and ambitions for the borough. Over the next 5 years we face some significant challenges but also some great opportunities to make Tamworth better. In that time, we aim to create and maintain a community that embraces change, welcomes diversity, and seek ways to bring communities together.

We have engaged as broadly as possible to develop our Corporate Plan, holding surveys and drop-in sessions to help us to identify and prioritise the outcomes, seeking feedback from specific groups and communities. In setting our budget to deliver this plan we also undertake an annual resident survey to ensure we involve you in determining where to invest our resources to achieve our priorities. The most recent one, carried out in October 2024, helped to set the budget for the coming year and our Medium-Term Financial Strategy, which helps us plan our finances over the life of the plan.

Residents have consistently told us that they want neighbourhoods to be cleaner and safer, for us to operate efficiently and actively respond to their needs. Greater prosperity for our communities and local businesses is a universal aspiration. Alongside our statutory obligations to collect council tax, manage development and administer key government regulations, other local priorities, like protecting the environment, community cohesion, developing skills and affordable housing are important to improving life in Tamworth. Whilst we may not be in control of many of these outcomes, our role in providing clear leadership and support to all those working in our borough is key to ensuring they are delivered for our residents and communities.

Due to reductions in central government funding and increasing inflationary pressures, difficult decisions must be taken around what services beyond our statutory minimum we continue to fund with the limited money we have available. While these decisions will be hard, we are committed to engaging with residents and partners on how we can mitigate their impact. We want to ensure long-term financial sustainability for the council, address the inequalities and disparities that exist across neighbourhoods and continue to create the opportunities for our communities and residents to thrive. This will mean working differently to how we have in the past.

This plan will drive the council to address the priorities identified within it as well as work closely with partner organisations who may be better placed to achieve them. We have worked hard to ensure this plan reflects the priorities of our community, so together we can build a better Tamworth.

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 81,000 people, Tamworth is a borough with much to be proud of. Our transport links, developing town centre, leisure facilities, including our cultural and heritage offer, all help make it a great place to live, work, study, and visit.

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

As a council we continue to face significant challenges to remain financially stable and resilient for the future. Demand for our services to support the most vulnerable continues to rise and cost pressures are increasing weekly, with UK inflation remaining at high levels. Like many councils across the country, we will be required to be brave and make difficult financial decisions, transform the services we must provide and lead the council through these challenging times. Councillors and officers will work closely together to find a better, more cost-effective way forward. We will also continue to listen to residents and businesses, as we work to do things differently as a more co-operative council and work alongside our stakeholders, including central Government, the local MP, neighbouring councils and local partnerships to address local need.

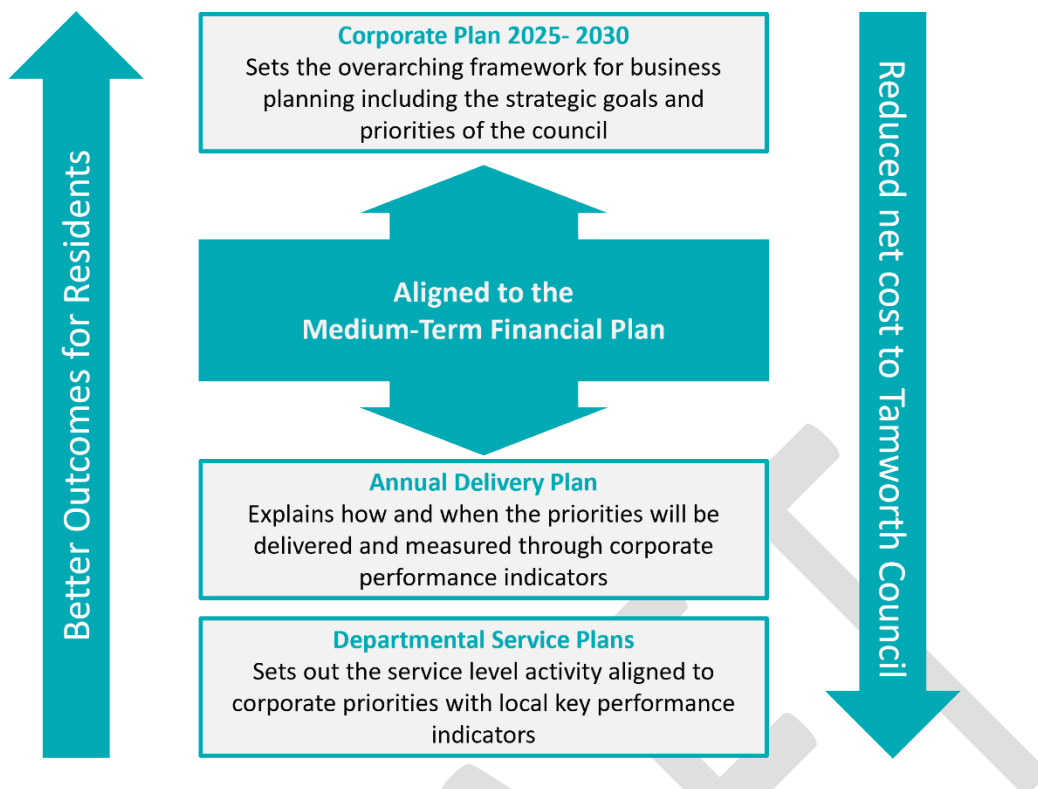
Tamworth has much going for it, but some areas of our borough face serious inequality and deprivation. Together, we need to give people in these areas skills and confidence and ensure we create good quality local jobs and opportunities. We will work with our partners to deliver a vision for the borough focused on aspiration, community cohesion and creating an environment for success.

We will also engage our partners to ensure the wellbeing for our residents and communities. In addition, we will maintain a clean and safe environment for our residents and visitors and play our part in ensuring the town remains an attractive area to live, visit and invest in.

Purpose of the corporate plan

Every well-run council needs a plan to enable staff, residents and partners to understand what the organisation is trying to achieve and how it plans to do that. It helps everyone prioritise and pull together around common priorities, so we deliver what we have promised.

This plan sets out our most important priorities and the aspirations for change that have been identified based on your feedback. These will be delivered alongside our day-to-day activities, ongoing projects and with support from our key partners.



Whilst set out as a 5-year plan, it will be reviewed every year and supported by an annual delivery plan. This will explain how and when the priorities will be delivered and measured through key performance indicators. Robust monitoring arrangements will be put in place including senior officers and members which will help us to be open and honest about our progress and how well we are performing.

It will also track our transformation to drive improvement in our services, digital opportunities and how we connect and engage with our residents, communities and partners to make Tamworth better.

Our Vision and Priorities

Our vision is to *Build a Better Tamworth* which we will achieve by delivering our key priorities over five years.

Prosperity & Place - We want growth in the local economy by creating jobs and a Tamworth we are all proud of, ensuring financial stability for all. We will:

1. Work with businesses to help them grow and create jobs
2. Identify and address skills shortages, including the digital divide
3. Make the town centre more vibrant and accessible
4. Regenerate and create spaces for people to use and enjoy
5. Promote tourism and nightlife by using our culture and heritage sites

Environment - We want to achieve net-zero carbon emissions, protect the environment and enhance local biodiversity. We will:

6. Keep Tamworth's local areas clean
7. Tackle fly tipping, littering and environmental offenses
8. Cut down on using carbon in our operations
9. Collaborate with partners to protect the environment
10. Provide eco-friendly housing options

Community Wellbeing - We want residents to lead safe, healthy and happy lives in communities that are cohesive, where diversity is celebrated. We will:

11. Work with our partners to support children and vulnerable individuals' wellbeing
12. Ensure our active health and wellbeing offer supports residents physical and mental health
13. Improve our offer to provide suitable homes and make good quality, eco-friendly and affordable housing available
14. Work with our partners to reduce homelessness and rough sleeping
15. Work with our partners to reduce crime and help our residents feel safe

Council - We're focused on being a caring, accessible and effective council that is financially resilient. We will:

16. Being visible, accessible, approachable and accountable to the community
17. Learn and work with communities to provide broader social benefits
18. Maintain balanced budgets in our financial strategies



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How we will work

To build a better Tamworth, we all need to work together and do our part. By working as a team, we can make a real difference. As a Council, we aim to be more cooperative, collaborating with our residents and key partners, ensuring financial stability, and focusing on how to best serve our communities while working with others in the Better Together Partnership.

Our new equality, diversity, and inclusion strategy, launched in December 2024, ensures that council services meet the needs of individuals, with a strong focus on community unity and social inclusion. We want to create a welcoming environment where everyone feels respected and valued and put residents at the heart of all we do. This strategy ensures our services comply with equality laws and addresses important issues like intersectionality, fairness, and gender-based discrimination.

We have also updated our council's values and behaviours to help achieve our vision.

Own it! Demonstrating accountability & professionalism

- Accepting responsibility
- Communicating clearly
- Making decisions based on evidence
- Respectful communication and active listening

Speak up with integrity & challenge poor behaviours

- Learning from mistakes
- Challenging harmful behaviours
- Encouraging open dialogue

A caring Council operating with compassion & openness

- Promoting work-life balance
- Fostering an inclusive environment
- Providing constructive feedback

Working as one team

- collaborating and working productively with others to achieve as Team Tamworth

Customer Focussed

- Putting residents and communities at the heart of all our activities

Heads Up

- Embracing change and having confidence to try new and innovative approaches, constantly improving

We have a huge opportunity to challenge the status quo, to find new ways of doing things, to look outside the borough and learn from others, and to genuinely work with our communities to co-design solutions to the things that matter most and that will work in our local context.



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Supporting Strategies and Plans

The Corporate Plan is supported by important existing strategies, plans and programmes, including:

- Medium-Term Financial Strategy (MTFS)
- Local Plan
- Asset Management Strategy
- Future High Streets Fund (FHSF) Programme
- Financial Resilience Plan
- Housing Revenue Account (HRA) Business Plan
- Net Zero commitments
- Social Housing Regulatory Programme (SHRP)
- Equality & Diversity Strategy
- Digital and Technology Strategy
- People and Organisational Development Strategy
- Customer Service & Access Strategy
- Community Safety Partnership Plan
- Corporate Peer Challenge Action Plan.

In October 2024, we asked the Local Government Association to help us identify key issues and challenge our approach, especially around communication and community engagement. The actions from this review will run alongside the Corporate Plan, as well as our response to the

We are also working on several new or updated strategies and plans to help achieve our corporate goals, including:

- Asset Management Plans
- Communications & Engagement Strategy
- Regeneration Strategy (including the Town Centre Master Plan)
- Local Development Scheme and updated Local Plan
- Community Cohesion Strategy
- Succession Planning Policy
- Review of the Constitution
- Government's plans for devolution and local government changes

Shared Services – Collaborating with Other Local Councils

We work closely with nearby councils, including sharing an internal Audit Service with Lichfield District Council. Lichfield also hosts our shared Health and Safety team, Building Control Service, and Joint Waste Service, which covers both areas for waste and recycling collections.

Additionally, we work with South Staffordshire District Council, which provides the South Staffordshire Legal Service for Tamworth and Lichfield, giving us access to specialized lawyers we couldn't afford on our own. We also receive support from Nuneaton & Bedworth Council on conservation issues.

At a regional level, we are in discussions with other Staffordshire councils to explore government plans for local government devolution. Working together on shared services could help address longer-term budget challenges and staff retention issues faced by many councils.

Acknowledgements

We want to thank everyone who helps make this work possible, including our councillors, employees, partners, and stakeholders. We look forward to working together to build a better Tamworth.

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Tamworth Borough Council - Annual Delivery Plan

Our five-year-long Corporate Plan includes the vision, strategic goals and priorities for the council. The vision is to **Build a Better Tamworth** which we will achieve by delivering our key priorities.

- **Prosperity & Place** - We want growth in the local economy by creating jobs and a Tamworth we are all proud of, ensuring financial stability for all
- **Environment** - We want to achieve net-zero carbon emissions, protect the environment and enhance local biodiversity
- **Community Wellbeing** - We want residents to lead safe, healthy, happy lives in communities that are cohesive, resilient and independent, where diversity is celebrated
- **Council** - We're focused on being a caring, accessible and effective council that is financially resilient

The annual Delivery Plan focuses on two areas, firstly including the activities and the actions the council needs to take over the coming year and secondly the key performance indicators. This will help us work towards delivering the five-year-long Corporate Plan priorities. Each activity entails associated actions that will be delivered by end of March 2026. Key performance indicators will enable us to understand the effectiveness of our services including successes and areas for improvement. We will compare ourselves to other local authorities, review best practice and innovations and embed continuous improvement into our practices. Robust monitoring arrangements will be implemented including senior officer and cabinet member oversight. This will help us to be open and honest about our progress and how well we are performing.

Strategic Goal: Overarching goal we wish to achieve over five-year period

Priorities: Priorities will support achieving the Strategic Goal

Activities: What activities are we going to undertake in the first year to work towards delivering the five-year-long priorities?

Milestones: What will be achieved each month, to enable delivery of the activities?

Corporate Key Performance Indicators: Statutory or non-statutory indicators to be monitored corporately at regular intervals

Prosperity & Place - We want growth in the local economy by creating jobs and a Tamworth we are all proud of, ensuring financial stability for all

Priorities	Activities	Monthly Milestones, Risks, Mitigations, BRAG rating	Lead Member Portfolio	Lead Directorate / Senior Accountable Officer	Senior Responsible Officer
<i>As listed within the Corporate Plan</i>	<i>Describe the activity (project, strategy or policy) that will be developed or implemented to deliver this priority.</i>	<i>Monthly milestones to be BRAG assessed. Associated Risks and Mitigations.</i>	<i>Which Cabinet member will lead this work</i>	<i>Must be single named Exec Director who will ultimately be accountable for delivery</i>	<i>Must be single named officer who takes responsibility for reporting on this activity</i>
1. Working with businesses to help them grow and create jobs					
2. Identify and address skills shortages, including the digital divide					
3. Regenerate and create spaces for people to use and enjoy					
4. Make the town centre more vibrant and accessible					
5. Promote tourism and nightlife by using our cultural and historic sites					

Corporate Key Performance Indicators	Target	Target BRAG	Rationale	Golden Thread	Benchmarkable?	Statutory or Non-Statutory? Y / N	SRO
Identify the KPI's to be reported to CMT Performance Board (Monthly) & Cabinet (Quarterly)	What is the target for 2025/26?	Red "Not started" Amber "At Risk" Green "On Track" Blue "Complete"	What will this indicator tell us?	Which Priority is it related to?	Is this KPI comparable to other similar local authorities? (CIPFA Benchmarking Group / LG Inform)	Is this KPI a statutory indicator?	Who is the Senior Responsible Officer?



Environment - We want to achieve net-zero carbon emissions, protect the environment and enhance local biodiversity.

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6. Keep Tamworth's local areas clean					
7. Tackle fly tipping, littering and environmental offenses					
8. Cut down on using carbon in our operations					
9. Collaborate with partners to protect the environment					
10. Provide eco-friendly housing options					

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Corporate Key Performance Indicators	Target	Target BRAG	Rationale	Golden Thread	Benchmarkable?	Statutory or non-statutory? Y / N	SRO
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12. Ensure our active health and wellbeing offer improves residents physical and mental health					
13. Improve our offer to provide suitable homes and make good quality, eco-friendly and affordable housing available					
14. Work with our partners to reduce homelessness					

15. Work with our partners to reduce crime and help our residents feel safe					
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Corporate Key Performance Indicators	Target	Target BRAG	Rationale	Golden Thread	Benchmarkable?	Statutory or Non-Statutory? Y / N	SRO
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Council - We're focused on being a caring, accessible and effective council that is financially resilient.

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16. Be visible, accessible, approachable and accountable to the community					
17. Maintain balanced financial budget					
18. Learn and work with communities to provide social benefits					

Corporate Key Performance Indicators	Target	Target BRAG	Rationale	Golden Thread	Benchmarkable?	Statutory or Non-Statutory? Y / N	SRO
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Identify the KPI's to be reported to CMT Performance Board (Monthly) & Cabinet (Quarterly)	What is the target for 2025/26?	Red "Not started" Amber "At Risk" Green "On Track" Blue "Complete"	What will this indicator tell us?	Which Priority is it related to?	Is this KPI comparable to other similar local authorities? (CIPFA Benchmarking Group / LG Inform)	Is this KPI a statutory indicator?	Who is the Senior Responsible Officer?

DRAFT

Summary Report

Corporate Plan Priorities Consultation – August 2024

This report sets out the findings from the public consultation exercise undertaken from 25 July to 27 August.

An online survey asked residents and stakeholders with an interest in building a better Tamworth for their thoughts and feedback to help further shape a corporate plan for the council.

We asked if the draft priorities are right for Tamworth if anything was missing and which areas were most important to them. For each draft priority, respondents were asked to tell us if the priorities and their descriptions are critical areas for improvement in Tamworth, if anything was unclear and rank them in order of importance.

It is clear from the results that there is much work to do to build trust with our residents (for all authorities) and reconnect our service delivery and performance to their needs and aspirations.

Residents want to see more concrete details of what each priority outcome will entail and how we will measure its delivery in the next phase of developing our Corporate Plan. We also need to be more conscious that the terms and language we use to describe our priorities is easy for residents to understand.

It is also apparent that some of the qualitative analysis of the responses does give some conflicting and contradictory results, such as the sense of urgency in reconnecting and providing visible leadership from the Council, versus the emphasis placed on prosperity as an area to tackle in the first year of the plan.

Findings

Priority A - Council

Creating a caring, co-operative, innovative and data driven council that is structured to deliver effective services:

- We are a council that is visible, approachable, and accountable.
- We work well with others as part of the Co-operative Council Innovation Network (CCIN).
- We ensure our customer processes are accessible and focused on delivery for the customer.
- We communicate well and ensure information provided to customers is readable and accessible to them.
- Our services are data driven, use data to target improvements and predict and prevent issues escalating.
- We make good decisions and take calculated risks based on good data and feedback.

1. How important is this priority and the descriptions as an area for improvement in Tamworth?				
Answer Choices			Response Percent	Response Total
1	Very important		47.47%	272
2	Quite important		35.25%	202
3	Neutral		13.28%	78
4	Not important		2.62%	15
5	Not at all important		1.40%	8
			answered	573
			skipped	19

1. Lack of Clarity and Ambiguity

Many respondents found the priorities unclear, questioning whether they are aspirational or reflective of the current situation. There is confusion about terms like "data-driven" and what constitutes "good decisions," with concerns that the language used is too vague or ambiguous, leading to varied interpretations.

2. Need for Tangible Examples and Specificity

People want concrete examples and specific, measurable targets. There is a demand for SMART (Specific, Measurable, Achievable, Realistic, Time-bound) goals to make the priorities more actionable and accountable. The mention of "data-driven"

services, for instance, needs clarification on what data is used, how it is collected, and its relevance.

3. Communication and Accessibility Concerns

A recurring theme is the perceived lack of effective communication and accessibility. Many express frustrations over the council's visibility and approachability, especially with the closure of physical offices like Marmion House. There is a call for better communication strategies, including face-to-face interactions and more inclusive methods for those not digitally inclined.

4. Inclusion of Listening and Customer-Centric Approaches

Respondents noted the absence of explicit mentions of listening to residents and prioritizing their needs. Suggestions include emphasising a "listening council" and ensuring that decisions are informed by community input rather than solely relying on data.

5. Doubt and Distrust in Current Practices

There is a strong sentiment of distrust, with many doubting that the council currently meets these priorities. Some feel that the council's statements are more aspirational than reflective of reality, particularly concerning transparency, accountability, and responsiveness.

6. Request for More Personal and Responsive Services

There is a desire for more personalized and responsive services, with concerns that a purely data-driven approach may overlook individual circumstances. Many feel that the human element should not be neglected, advocating for a balance between data and common sense in decision-making.

7. Understanding and Integration of Cooperative Council Innovation Network (CCIN)

The concept of CCIN is not well understood, with multiple respondents asking for clarification on what it means and its implications for the community. There is a need for clearer communication about what being a part of CCIN entails.

8. Feedback on Prioritisation and Practical Implementation

Some respondents questioned whether these priorities are indeed the most pressing issues, with suggestions that certain priorities, such as improving the visibility and accessibility of the council, should take precedence. There is also a call for ensuring that these priorities translate into practical actions that residents can see and benefit from.

9. Critique of the Council's Current Performance

Several responses reflect dissatisfaction with the council's current performance, particularly in areas like customer service, maintenance, and public safety. There is a sentiment that the council has been "invisible" or ineffective, especially since the COVID-19 pandemic, with calls for more proactive and visible community leadership.

10. Data-Driven vs. People-Driven Approach






Some respondents express concern that an overemphasis on being data-driven could lead to impersonal decisions. They suggest that while data is important, the council should also focus on being needs-driven and consider qualitative feedback from the community.

These themes show a need for the council to clarify its priorities, improve communication, and ensure that its actions align with the community's needs and expectations.

Priority B - Prosperity

Growth in the local economy, skills and jobs, investment in areas that support financial stability and balanced budgets, obtaining best value:

- We work with businesses to promote start up, growth and sustain employment.
- We work with partners to create jobs and broaden workforce skills.
- Our Medium -Term Financial Strategy and Housing Revenue Account Business Plan are balanced and deliver value for money.
- We spend and invest wisely to save money in the long term.
- We procure sustainably with social value in mind.
- We hold partners and contractors to account for their performance.

3. How important is this priority and the descriptions as an area for improvement in Tamworth?				
Answer Choices			Response Percent	Response Total
1	Very important		61.25%	343
2	Quite important		33.04%	185
3	Neutral		4.46%	25
4	Not important		0.54%	3
5	Not at all important		0.71%	4
			answered	560
			skipped	32

1. Accountability and Transparency

Contractor and Partner Accountability: Concerns about how the council holds contractors and partners accountable, with reports of poor performance and lack of visible standards.

Transparency in Decision-Making: Calls for more transparency in council decisions, particularly around spending, contractor selection, and how these choices help the local community.

2. Economic and Business Development

Support for Local Businesses: Feedback suggests that the council's support for new and existing businesses, especially startups, is unclear. There is a need for more focus on making Tamworth attractive for businesses and ensuring affordable rates and accessible locations.

Impact on Local Economy: Questions about how the council plans to improve Tamworth's economy, particularly in the town centre, which is seen as declining. There is also concern about balancing growth between different areas of Tamworth.

3. Practicality and Realism of Plans

Feasibility of Goals: Scepticism about the realism of attracting high-skill, high-paying jobs to Tamworth, especially given competition from nearby cities like Birmingham.

Implementation Details: Calls for more concrete examples and data on how the council will achieve its goals, including specifics on how prosperity will be measured and delivered.

4. Communication and Language

Complex and Jargon-Laden Language: The use of jargon and complex language makes the priorities difficult to understand for residents. There is a need for clearer, more accessible communication.

Perceived Disconnect Between Words and Actions: Residents feel that the council's statements often consist of "good intentions" without clear evidence of action or impact.

5. Community Involvement and Representation

Engagement with Residents: Questions about how residents are being involved in decision-making processes, especially in terms of spending and economic development.

Relevance to Local Needs: Concerns that the priorities may not fully align with the actual needs and aspirations of Tamworth residents, such as better infrastructure, affordable housing, and social services.

6. Infrastructure and Town Planning

Town Centre Development: Significant concerns about the decline of Tamworth's town centre, with suggestions for more investment and better planning to attract businesses and tourists.

Housing and Infrastructure Balance: Issues around housing development without corresponding improvements in infrastructure like schools, roads, and healthcare services.

7. Education and Skills Development

Support for Education and Vocational Training: Uncertainty about how the council plans to improve educational attainment and vocational opportunities for young people, particularly in linking education with local business needs.

8. Sustainability and Procurement

Sustainability Goals: Confusion about what “procure sustainably” and “social value” mean in practice, and how these will be measured and achieved.

Value for Money: Concerns that the council's focus on long-term savings might not always align with immediate value for money, with calls for clearer procurement routes and standards.

9. Perception of Tamworth’s Decline

General Decline of the Town: A recurring theme of dissatisfaction with the perceived decline of Tamworth, including empty shops, poor infrastructure, and a lack of appealing amenities.

Need for Revitalization: Strong sentiment that the council needs to take more proactive measures to revitalize the town, including attracting diverse businesses and improving public spaces.

These themes highlight areas where residents seek more clarity, engagement, and tangible results from the council's Prosperity Priorities

Priority C - Place shaping

All communities feel safe, cared for and can be proud of their area, including our vibrant town centre:

- We work with partners to create a more vibrant town centre, which is accessible to all, with an improved retail and residential offer.
- We work with partners to ensure footpaths and cycleways are clear and well maintained.
- Our future high street funding projects deliver regeneration and support enterprise.
- We offer new markets and improve events as part of a town centre plan.
- We work with partners to ensure crime is reduced and Tamworth is safer.
- We improve tourism and night-time offer, making best use of our historic and cultural assets.

5. How important is this priority and the descriptions as an area for improvement in Tamworth?

Answer Choices		Response Percent	Response Total
1	Very important	71.88%	406
2	Quite important	23.72%	134
3	Neutral	3.01%	17
4	Not important	0.71%	4
5	Not at all important	0.71%	4
		answered	565
		skipped	27

1. Town Centre Revitalization

There is a strong need to make Tamworth's town centre vibrant and welcoming by improving retail offerings, promoting tourism, and better using historical and cultural assets. The focus should be on creating a more inviting environment, enhancing markets, and addressing the decline in shops. There is also concern that much of the investment is directed away from the town centre, leading to its neglect with numerous vacant shops and a lack of vibrancy. There is a belief that the town centre is deteriorating, and efforts to revitalize it have been ineffective or misdirected.

Suggestions include lowering business rates, encouraging diverse and independent shops, and improving the market areas.

2. Safety and Crime

Residents feel unsafe due to visible crime and anti-social behaviour, particularly in the town centre. They believe minor crimes are not being addressed, leading to more serious issues. There is a call for increased police presence and stronger partnerships between the council and law enforcement to improve safety. Residents report feeling unsafe, particularly due to recent incidents of violence. There is a strong call for a more visible and active police presence, including the reopening of a local police station, to address crime and antisocial behaviour.

3. Tourism and Heritage

Tamworth's potential as a tourist destination is noted, with suggestions to capitalize more on its historical assets, with suggestions to better promote its heritage and cultural events to attract tourists. There is a call to develop the town's historical connections and landmarks, such as the Saxon Mill and the legacy of Colin Grazier, to draw more visitors. However, some feel that tourism is underdeveloped, and better marketing, improved amenities, and events could attract more visitors.

4. Infrastructure and Public Spaces

The state of footpaths, cycleways, and roads is a significant concern. Many areas are overgrown, poorly maintained, and unsafe, particularly for vulnerable populations like people with disabilities. There is frustration over the lack of responsibility and action between the council and other authorities about these issues. Overgrown areas, inadequate street lighting, and neglected green spaces are common complaints. There is a desire for better infrastructure that enhances both functionality and aesthetics, making the town more welcoming. Better transport links, especially between Ventura Park and the town centre, are needed to boost foot traffic. Improving parking availability and ensuring pathways are accessible and clear are also priorities to enhance mobility for all residents.

5. Community Engagement and Accountability

There is a call for more transparency, measurable goals, and public involvement in decision-making. Residents want clear, actionable plans with accountability for progress. Some feel current efforts are too vague or aspirational without concrete outcomes.

6. Social and Cultural Issues

There is a desire for more inclusivity and multicultural engagement within the community. Suggestions include promoting diversity, addressing issues related to immigration, and fostering a more open and welcoming environment for all residents. Suggestions include more focus on improving social attitudes and fostering a sense of pride in Tamworth. Ideas for enhancing community cohesion, such as volunteer groups and more youth-oriented activities, were mentioned.

7. Sustainability and Environment

A few comments highlight the need for more attention to sustainability, including the development of green spaces and climate-resilient infrastructure. Residents are looking for commitments to environmental stewardship alongside urban development. There are concerns about cleanliness and the general upkeep of public spaces. Residents note the need for more frequent road sweeping, better waste management, and regular maintenance of green spaces to prevent localized flooding and improve the overall appearance of the town.

8. Economic and Social Disparities

There is concern that efforts are concentrated in specific areas, like the castle grounds, while neglecting others. Residents want more fair development that helps all parts of Tamworth, including more amenities and services in less affluent areas.






9. Future Vision

Finally, there is a desire for a clearer, more ambitious vision for Tamworth that integrates all these themes—safety, economic vitality, tourism, and community pride—into a cohesive plan that revitalizes the town and makes it a desirable place to live and visit.

Priority D - Environment

We have a roadmap to achieving net-zero, environmentally friendly and sustainable assets and enhancing biodiversity in the borough:

- We educate and support reductions in litter, waste, and increased recycling.
- We use enforcement powers to tackle fly tipping and other environmental crimes.
- We reduce the use of carbon at the Council and in our operations.
- We work with partners to protect and improve our environment and achieve net zero for the borough.
- We help to create a sustainable future where nature can thrive to keep us healthy and safe.
- We ensure Tamworth offers world-class environmentally friendly housing.

7. How important is this priority and the descriptions as an area for improvement in Tamworth?				
Answer Choices			Response Percent	Response Total
1	Very important		48.88%	269
2	Quite important		36.93%	212
3	Neutral		10.80%	62
4	Not important		3.66%	21
5	Not at all important		1.74%	10
			answered	574
			skipped	18

The feedback on environmental issues in Tamworth reflects a broad range of concerns, highlighting the need for more concrete action, better communication, and stronger enforcement by the council. Here are the key themes:

1. Action vs. Words

There is significant scepticism about the council's commitment to environmental goals, with many residents feeling that actions do not match the promises made. They emphasize the need for clear, measurable targets, such as setting specific dates for achieving net-zero emissions.

2. Waste Management and Recycling

Many residents' express frustration with current waste management practices, particularly the use of blue recycling bags, which are seen as inadequate. There is also concern about fly-tipping, insufficient litter collection, and the need for better enforcement against those who litter.

3. Housing and Infrastructure

While there is support for environmentally friendly housing, residents question whether new developments are truly sustainable. They urge the council to focus on improving existing housing stock rather than building more homes, which they believe the town's infrastructure cannot support.

4. Local Cleanliness and Maintenance

Cleanliness of public spaces, particularly the issue of litter and graffiti, is a major concern. Residents call for more frequent maintenance, including street sweeping and litter picking, and question why so much of this work falls to unpaid volunteers.

5. Net-Zero and Environmental Goals

There is a divide in opinion on the pursuit of net-zero emissions. Some see it as an essential goal, while others view it as unrealistic or even a "scam." Many request more transparency on how these goals will be achieved and what the costs will be.

6. Public Involvement and Education

Several comments suggest a need for greater community involvement in environmental initiatives and better education on sustainability, particularly in schools. Some also propose incentivizing or formally recognising volunteer efforts to maintain public spaces.

7. Infrastructure for Electric Vehicles and Green Energy

The need for infrastructure to support electric vehicles and renewable energy in new developments is highlighted, with some residents noting that current and future housing projects should incorporate these elements.

8. Environmental Impact of Development






Concerns are raised about the impact of ongoing and future housing developments on green spaces and the local environment, with calls to preserve natural habitats and better manage the environmental footprint of new construction.

Residents clearly want more accountability, transparency, and proactive measures from the council to address these environmental issues.

Priority E - Community Wellbeing

Residents live long, healthy, prosperous lives in communities that are resilient and independent:

- We provide accessible services that support the most vulnerable in our society.
- We work with partners to keep children, young people, and marginalised groups healthy and safe with every opportunity to thrive in their community.
- We ensure more people have the skills to access our services digitally and in our housing stock.
- We have a real commitment to providing more affordable housing and reduce homelessness.
- We will increase the number of Disabled Facility Grant (DFG) cases delivered in a shorter amount of time.
- We work with partners to build foundations for long and healthy lives.

9. How important is this priority and the descriptions as an area for improvement in Tamworth?				
Answer Choices			Response Percent	Response Total
1	Very important		54.59%	303
2	Quite important		33.51%	186
3	Neutral		9.19%	51
4	Not important		1.44%	8
5	Not at all important		1.26%	7
			answered	555
			skipped	37

1. Access to Digital Services

There is a need to clarify whether residents require skills to access services or if services will be provided within housing stock. More efforts are needed to ensure that all residents, especially those without digital literacy, can access services.

2. Environmental Health

The role of Environmental Health in ensuring food safety, regulating businesses, and investigating outbreaks should be emphasized as a critical part of public health and community wellbeing.

3. Housing and Adaptations

Concerns were raised about the allocation of housing, with issues such as inappropriate housing stock leading to unnecessary adaptations. There is a call for better planning and retention of adaptations in void properties, alongside considerations for those who cannot afford essential fittings like carpets.

4. Service Accessibility

The importance of providing accessible, council-led services is highlighted, particularly with a rise in scamming and the frustration with digital-only or phone-based services. There is a need for in-person options and better information dissemination.

5. Youth and Leisure

There is a demand for more affordable sports and leisure activities for younger residents, and improved information on available resources. Concerns about safety in the town and the need for community spaces like youth centres were often mentioned.

6. Healthcare Services

A sizeable part of the feedback focused on the lack of accessible healthcare services, such as GP appointments, NHS dentistry, and local hospital services. The reopening of the George Bryan Centre and improvements at the Robert Peel Hospital were also called for.

7. Homelessness and Housing Affordability

There is a strong sentiment that housing should be prioritized for residents, with calls for more social housing, affordable homes, and better support for the homeless. Issues related to housing affordability and the need for more single-person accommodations were also raised.

8. Support for Vulnerable Populations

The council was urged to focus on supporting vulnerable groups, including those with disabilities, the elderly, and families struggling with the cost of living. There is also a call for more mental health support and services to combat loneliness.

9. Community Safety and Wellbeing

Concerns about community safety were prevalent, with residents expressing a desire for more visible policing and safer public spaces. The importance of tackling antisocial behaviour and ensuring the wellbeing of all community members was emphasized.

10. Local Infrastructure and Development

Feedback included concerns about the sustainability of housing developments, the impact on local infrastructure, and the need for community-oriented planning that considers the needs of all residents, including those in rural areas.

11. Communication and Engagement

There is a need for better communication between the council and residents, especially in understanding and accessing available services. The council is

encouraged to engage more directly with the community, particularly in decision-making processes.

Several comments reflected broader concerns about local governance, including dissatisfaction with the handling of new developments, the need for a more personal approach in council services, and frustrations with the perceived lack of action on certain issues.

In summary, the feedback reflects a desire for more inclusive, accessible, and responsive services, with a strong focus on housing, healthcare, and community safety. There is a clear call for the council to better address the needs of vulnerable populations, improve local infrastructure, and engage more effectively with residents.






Ranking and Priority

The summary ranking of the responses provides a clear direction to focus on place shaping and prosperity, with less emphasis placed on the Council and environment.

11. For each of the five priorities, please rank how important they are to deliver in the next five years, with your top choice being first.		
Item	Total Score ¹	Overall Rank
Place shaping - All communities feel safe, cared for and can be proud of their area, including our vibrant town centre.	2155	1
Prosperity - Growth in the local economy, skills and jobs, investment in areas that support financial stability and balanced budgets, obtaining best value.	2146	2
Community Wellbeing - Residents live long, healthy, prosperous lives in communities that are resilient and independent.	1703	3
Council - Creating a caring, co-operative, innovative and data driven council that is structured to deliver effective services.	1530	4
Environment - We have a roadmap to achieving net-zero, environmentally friendly and sustainable assets and enhancing biodiversity in the borough.	1240	5
	answered	585
	skipped	7

¹ Score is a weighted calculation. Items ranked first are valued higher than the following ranks, the score is a sum of all weighted rank counts.

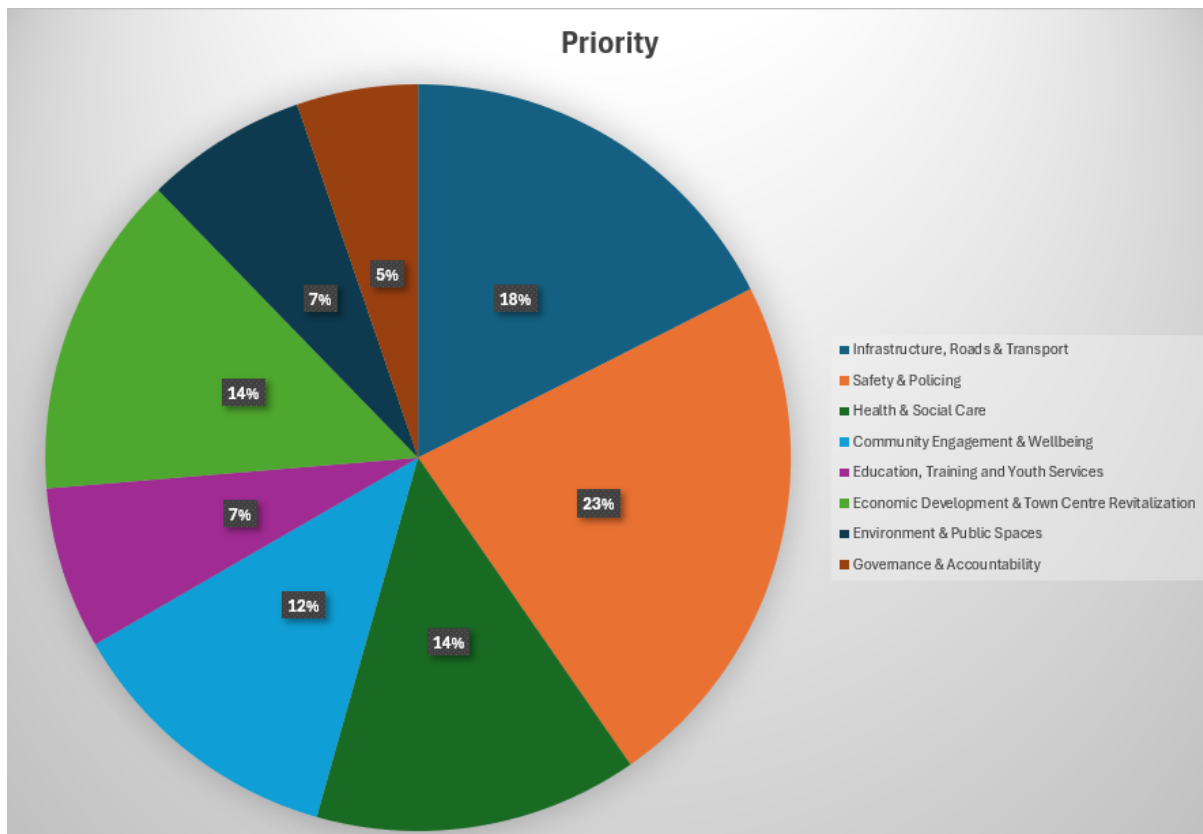
In terms of immediate priorities for 2025/26 Action plan, once again prosperity and place shaping scoring highest, with prosperity coming top in this question.

12. If you had to choose one to be the top focus in the next 12 months, which would it be?			
Answer Choices		Response Percent	Response Total
1	Council - Creating a caring, co-operative, innovative and data driven council that is structured to deliver effective services. 	5.64%	29
2	Prosperity - Growth in the local economy, skills and jobs, investment in areas that support financial stability and balanced budgets, obtaining best value. 	38.52%	198
3	Place shaping - All communities feel safe, cared for and can be proud of their area, including our vibrant town centre. 	38.38%	187
4	Environment - We have a roadmap to achieving net-zero, environmentally friendly and sustainable assets and enhancing biodiversity in the borough. 	4.67%	24
5	Community Wellbeing - Residents live long, healthy, prosperous lives in communities that are resilient and independent. 	14.79%	76
		answered	514
		skipped	78

Missing priorities and themes

Consultees were asked to advise of up to three priorities they felt were missing from the current draft plan.

The responses have been grouped into broader categories based on common themes and then the percentage split for each category has been calculated.



1. Safety & Policing

- Increase in police presence.
- Crime reduction (anti-social behaviour, drug use)
- Road safety improvements
- Safety of residents
- Addressing anti-social behaviour

2. Infrastructure & Transport (Roads, Traffic)

- Fixing potholes and roads
- Improving road network and traffic management

- Affordable housing and sustainable housing development
- Public transport improvements
- Infrastructure to cope with new developments
- Parking solutions, footpath resurfacing

3. Health & Social Care

- Access to health services, including hospitals and GPs.
- Social care improvements, especially for vulnerable groups
- Mental health services
- Fitness activities for elderly/disabled.

4. Economic Development & Town Centre Revitalisation

- Revitalizing the town centre, filling vacant shops
- Supporting local businesses and economic growth
- Promoting tourism and heritage

5. Community Engagement & Wellbeing

- Communication and engagement with residents
- More local participation in decision-making
- Supporting community initiatives and volunteer efforts
- Addressing community wellbeing and inclusion
- Organizing more community events, promoting arts and culture
- Social Equity & Inclusion

6. Education, Training and Youth Services

- Education for all age groups
- Better SEND provision in schools
- Promoting employment for 16-18-year-olds
- Youth offender rehabilitation
- Youth services and community centres

7. Environment & Public Spaces

- Maintaining green spaces and heritage sites
- Addressing environmental issues

- Parks, play areas, and tidying up public spaces.

8. Governance & Accountability

- Ensuring accountability in council services
- Lobbying for more resources from County Council
- Transparency in council operations

9. Housing & Development (5%)

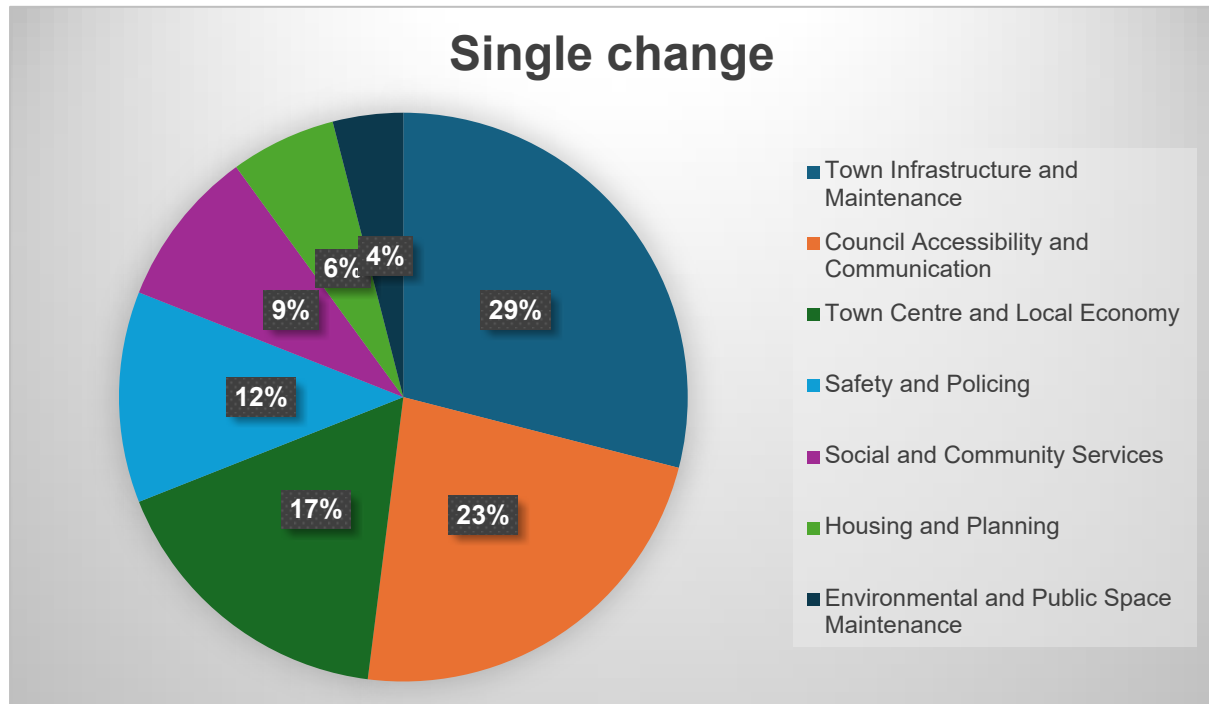
- Housing for local residents
- Managing new developments
- Planning restrictions on building sites
- Ensuring infrastructure supports new housing.
- Housing affordability
- Social housing

This breakdown helps understand the community's priorities, highlighting a strong focus on public safety, infrastructure, and health, while also emphasising the importance of community engagement, economic development, and accountability.

All of these 'missing' priorities do feature in the plan through our work with partners and consideration should be given to how we articulate this in future versions of the plan.

Single change that will make Tamworth Better

All changes suggested have been grouped and categorised. Again, an estimated percentage has been applied to the categories.



1. Town Infrastructure and Maintenance (29%)

- **Focus:** Improving roads, potholes, cleanliness, public spaces, and overall town appearance.
- **Comments Include:**
 - Fixing potholes and improving road conditions.
 - Concerns about street cleanliness, overgrown bushes, weeds, and general maintenance.
 - Enhancing the town's appearance by removing graffiti and improving public spaces.
 - "Clean the town up... And not just the town centre."
 - "Improve infrastructure along with the increase of Tamworth's population."

2. Council Accessibility and Communication (23%)

- **Focus:** Reopening council offices, improving face-to-face services, transparency, communication, public engagement and accountability.

- **Comments Include:**

- Requests for more accessible council services and reopening council offices.
- Calls for better communication and transparency from the council.
- Suggestions for increased public engagement and being more present in the community.
- "Make all departments far more accessible to the Tamworth public."
- "Keep in touch with residents with a community newsletter via email."
- Calls for better financial management and accountability to residents.
- "Tell the people where the money is spent."
- "Insist on performance targets for council staff."
-

3. Town Centre and Local Economy (17%)

- **Focus:** Revitalising the town centre, supporting local businesses, and promoting tourism.

- **Comments Include:**

- Investment in the town centre to attract businesses and tourists.
- Support for small businesses, reducing rents, and boosting the local economy.
- Promoting Tamworth's history and tourism potential.
- "Force Ankerside shopping centre to reduce rents."
- "The town centre should be promoted as a tourist destination."

4. Safety and Policing (12%)

- **Focus:** Increasing police presence, improving safety, and addressing anti-social behaviour.

- **Comments Include:**

- Requests for more visible police in public spaces.
- Comments on making the town safer by addressing crime and anti-social behaviour.
- "Tackle anti-social behaviour."
- "Safety for residents."

- "Stop the e-bikes in the castle grounds."

5. Social and Community Services (9%)

- **Focus:** Improving healthcare, social support, and community projects.
- **Comments Include:**
 - Requests to improve local healthcare services.
 - Suggestions for more community projects, social hubs, and youth centres.
 - "Invest in more high-quality family support."
 - "Provide more groups for new Mums, Youth Clubs, and improved sport facilities."

6. Housing and Planning (6%)

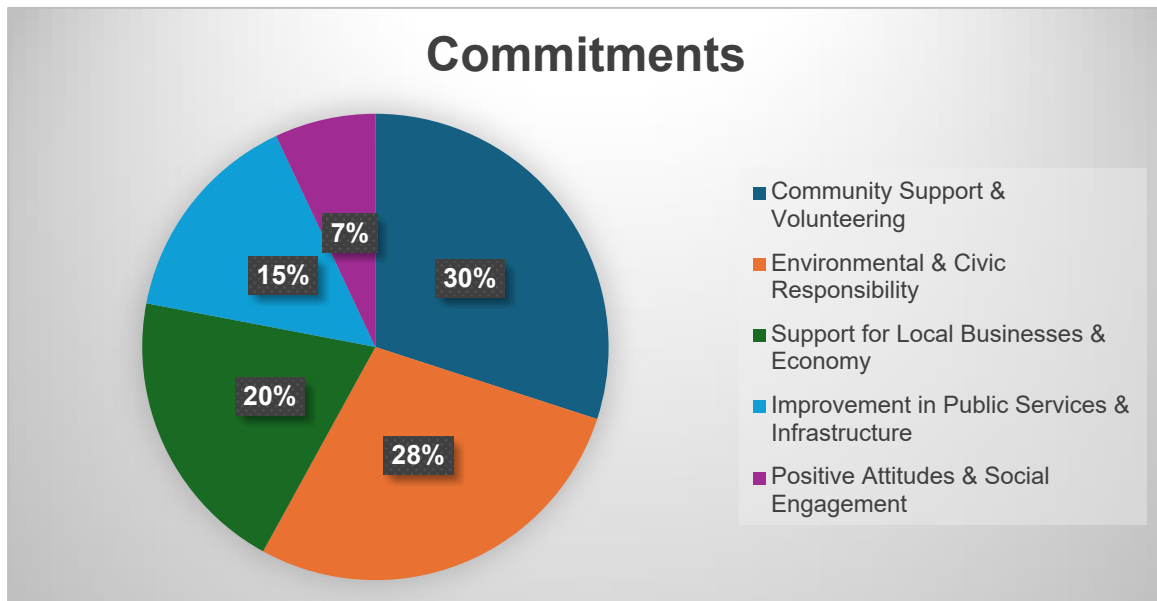
- **Focus:** Addressing housing needs, managing public housing, and urban planning.
- **Comments Include:**
 - Requests for better housing inspections and management.
 - Concerns about overdevelopment and focusing on infrastructure before building new houses.
 - "More adapted housing stock to cater to the aging population."
 - "Social housing."

7. Environmental and Public Space Maintenance (4%)

- **Focus:** Cleanliness, grass cutting, weed control, and environmental initiatives.
- **Comments Include:**
 - Addressing maintenance of public areas and promoting green policies.
 - "Grass mowed and cuttings not left all over pavements."
 - "Plant wildflowers and encourage more environmentally friendly policies."

Personal Commitments to Making Tamworth Better

All respondents were asked to consider what three things they would commit to doing to play their part in 'Making Tamworth Better'?



Commitments made by participants in the survey fell into 5 category areas:

1. Community Support & Volunteering (30%)

- Volunteer to help the community.
- Support local clubs, events, or festivals.
- Attend local meetings and engage in discussions.
- Help local neighbourhoods.
- Welcome new members to the community.
- Look after neighbours.
- Support those affected by illness, such as cancer.
- Participate in community activities and initiatives.
- Engage in local meetings to air issues & concerns.

- Promote Tamworth's history and events.
- Engage in local activities and civic initiatives.
- Engage in community watch or neighbourhood groups.
- Use your vote and encourage others to do so.

2. Environmental & Civic Responsibility (28%)

- Recycle more, reduce waste, and pick up litter.
- Use public transport or drive less.
- Promote environmental projects like gardening and litter picking.
- Report issues (crime, vandalism, environmental hazards) promptly.
- Participate in local environmental cleanups.
- Care for green spaces and gardens.
- Push for a safer, cleaner town.
- Take pride in and respect the environment.
- Report any anti-social behaviour or environmental hazards.
- Maintain streets, paths, and green spaces.

3. Support for Local Businesses & Economy (20%)

- Shop locally, support small businesses, and use local facilities.
- Encourage friends and family to visit the town.
- Support local businesses and market days.
- Change buying habits to support the town centre.
- Encourage job prospects within the borough.
- Use local businesses and promote them to others.
- Participate in efforts to revitalise the town centre.

4. Improvement in Public Services & Infrastructure (15%)

- Keep streets clean and well-maintained.
- Advocate for better public services and infrastructure.
- Campaign for better services.
- Hold authorities to account.





5. Positive Attitudes & Social Engagement (7%)

- Be kind, respectful, and treat others well.
- Promote positive discussions about Tamworth.
- Support crime prevention and be a good neighbour.
- Spread good news stories and stop disinformation.
- Participate in efforts to improve the community's morale.
- Be involved in promoting local events and activities.









Respondent Demographics

592 completed survey responses were received, with a further 1200 viewing the survey and aborted and attempts, which will be subject to further analysis. Over 500 hard copy surveys were also distributed with around 100 returned and included in the survey results input on to the system.

Gender

Answer Choices			Response Percent	Response Total
1	Male		39.44%	224
2	Female		55.46%	315
3	Prefer not to say		4.23%	24
4	Prefer to self describe (please tell us)		0.88%	5
			answered	588
			skipped	24














Age

Answer Choices			Response Percent	Response Total
1	18-24		1.24%	7
2	25-34		9.01%	51
3	35-44		17.31%	98
4	45-54		19.98%	113
5	55-64		23.85%	135
6	65-74		18.37%	104
7	75+		5.48%	31
8	Prefer not to say		4.77%	27
			answered	586
			skipped	28

The population of Tamworth is estimated to be around 81,000 with relatively more children aged under 16 compared to England and less people aged 85 and over, many of whom are income deprived. The overall population for Tamworth is projected to increase by 2% to 2026 with significant growth in people aged 65 and over and aged 85 and over. The rate of increase in the number of older people aged 85 and over in Tamworth is faster than the England average.

The population is 51% women and 49% men. The average age of residents is 39; the median age is also 39.

Ethnicity

Answer Choices			Response Percent	Response Total
1	I do not wish to disclose my ethnic origin		8.67%	49
White				
2	British		81.24%	459
3	Irish		0.88%	5
4	Other		3.36%	19
Asian or Asian British				
5	Indian		0.53%	3
6	Pakistani		0.00%	0
7	Bangladeshi		0.00%	0
8	Any other Asian background		0.18%	1
Mixed				
9	White and Black Caribbean		0.35%	2
10	White and Black African		0.00%	0
11	White and Asian		0.35%	2
12	Any other mixed background		0.35%	2
Black or Black British				
13	Caribbean		0.53%	3
14	African		0.00%	0
15	Any other black background		0.00%	0
Other Ethnic group				
16	Chinese		0.18%	1
17	Any other Ethnic group		0.18%	1
18	Other (please specify):		3.19%	18

Census data shows that 5% of the population are from minority ethnic groups.

Most residents speak English as their first language (98.3%)

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Equality, Social Inclusion and Health Impact Assessment (ESHIA)

An ESHIA is a review of a new or existing policy, strategy, project, report or service change to establish whether this has a differential impact on specific equality groups and identifies how we can improve equality of opportunity for different groups of people.

An ESHIA aims at improving Tamworth Borough Council's work, by promoting equality, social inclusion, health and wellbeing by ensuring that the proposed or existing policy promotes equality and can benefit a wide range of people.

Details

Title of the proposal	Corporate Plan 2025-2030	
Director responsible for the project or service area	Executive Director Organisation	
Officer completing the assessment	Christie Tims	
Date conducted	14 January 2025	
Who are the main stakeholders?	Executive Leadership team, Cabinet, Statutory officers, Corporate Management team Will also extend to: <ul style="list-style-type: none"> • Residents • Business • Staff Team • Elected Members • Registered social landlords • County Council • Partner Authorities – South Staffs, Lichfield and North Warks • NHS, ICB and health providers • Key suppliers/contractors • Voluntary sector 	
What is being assessed?	A decision to review or change a service	
	A strategy, policy, report or procedure	x
	A function, service, or project	
What kind of assessment is it?	New	x
	Review of existing	

Part One - Initial screening:

This section should be used to carry out an initial screening of changes or decisions to help to decide whether a full ESHIA is required.

The following six screening questions are designed to assess whether this proposed change is likely to have an impact on equality, social inclusion, health and wellbeing.

		Yes	No
1	Does this new or revised project, proposal, policy, report, procedure likely to have an impact?	x	
2	Does the proposal seek agreement to a key decision involving allocation of resources, such as changes in funding or resources, initiation of a new programme or project or procurement?		x
3	Does the proposal seek agreement on restructuring or reorganising of staffing?		x
4	Will this policy or proposed change have any impact on potential suppliers?		x
5	Does this policy or proposed change impact on any HR policy or practice within the council?		x
6	Does this policy or proposed change have any implications for equalities, social inclusion and health and wellbeing not covered above?	x	

1. If the answer is **no** to all the questions, please provide a summary below outlining why this conclusion has been reached.
2. If the answer is **yes** to any of the questions, please conduct the full ESHIA as detailed in Part two.

If you are unsure of any of the answers, please seek advice from Human Resources.

Summary of initial screening outcome:

Decision	Yes	No
Initial screening only		
Proceed to Part Two, full assessment	x	

Initial screening completed by	Christie Tims
Date	14.1.25

Full screening completed by	Christie Tims
Date	14.1.25

Equality, Social Inclusion and Health Impact Assessment (ESHIA)

Part Two: Full assessment

Section 1

The purpose of the project, proposal or decision required. Set out the aims, objectives, purpose and outcomes of the area being impact assessed. Are any other functions, policies or services linked to this assessment?

The Corporate Plan for 2025 - 2030 that sets out the Council's vision and priorities has been in development since June 2024.

The Annual Delivery Plan will have far reaching implications in terms of the documents and actions that will be developed to address key strategic challenges for the council. However the draft action plan does not authorise any policy or strategy to be agreed without following normal approval routes and being subject to further ESHIA. These include:

New Corporate Plan 2025-2030
MTFS and HRA business plan
Equality and Diversity Strategy
Financial Stability Plan
Performance Management Framework
Asset Strategy and Management Plans
SMART Working Framework
OD and Workforce Strategy
ICT Strategy/Digital Transformation Strategy
Asset Based Community Development plan/Community Cohesion work
Social Housing Improvement Programme

Section 2

Evidence used and considered. Include analysis of any missing data.

The new corporate plan has been informed by several key elements:

- The aspirations of the new Cabinet, the council and all members
- The views of residents through regular surveys and specific consultation exercises commissioned in 2024 and the most recent survey in Autumn 2024
- Existing commitments, such as key projects and existing strategies that extend beyond the current plan period.
- The current and future financial situation of the council – the Medium-Term Financial Strategy (MTFS).
- Local statistics that highlight areas of concern/ focus
- Input from statutory and key strategic partners including Better Together Tamworth
- The views of local businesses, voluntary sector and staff

An outline of the emerging plan was presented to Corporate Scrutiny in June and further in August on progressing consultation and engagement.

The development of the plan has been shaped by consultation and collaboration with residents, staff, members, community groups and key strategic partners to ensure it reflects the needs and expectations of our residents. It is an integral part of our medium-term financial strategy (MTFS) to ensure its viability and deliverability. As such the Corporate Plan itself forms an integral part of the Medium-Term Financial Strategy Document, which will be presented for discussion at Cabinet on 20 February and for adoption at Full Council on 25 February.

Section 3

Consultation undertaken with interested parties who will/may be affected proposal? What were the outcomes of the consultation?

Key officers from ELT and CMT have been consulted to ensure the plan will enable them to create realistic plans to deliver the actions outlined and sufficient Key Performance Indicators (KPIs) to allow effective performance management and assurance of progress.

Section 4

What are the potential or actual impacts of the proposal? Please consider both the direct and indirect impact and refer to the guidance for additional information.

Impact Area	Impact? Positive (P) Negative (N) Neutral (Ne)	Details of the impact	Action to address negative impact
Protected Characteristic, as outlined in the Equality Act 2010			
Age	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Disability	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Gender reassignment	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.

Marriage and civil partnership	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Pregnancy and maternity	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Race	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Religion or Belief	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Sex	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Sexual Orientation	Neutral		The annual delivery plan will ensure all residents with protected characteristics have been considered and actions reflect the needs of all residents.
Are there socio-economic groups likely to be affected? If yes, please provide detail below			
Other social exclusion	Neutral		The annual delivery plan will ensure all residents from different socio-economic groups have been considered and actions reflect the needs of all residents.
Digital exclusion	Neutral		The annual delivery plan will ensure all residents from different socio-economic groups have been considered

			and actions reflect the needs of all residents.
Veterans and serving members of the armed forces and their families	Neutral		The annual delivery plan will ensure all residents from different socio-economic groups have been considered and actions reflect the needs of all residents.
Young people leaving care	Neutral		The annual delivery plan will ensure all residents from different socio-economic groups have been considered and actions reflect the needs of all residents.
Health and Wellbeing: Individuals and communities in Tamworth	Impact: Positive (P) Negative (N) Neutral (Ne)	Explanation	Action to address negative impact
Will the proposal have a direct impact on an individual's health, mental health and wellbeing?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will the proposal directly impact on housing?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be a likely change in demand for or access to public services such as health and social care services?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be an impact on diet and nutrition?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be an impact on physical activity?	Neutral		The annual delivery plan will ensure these needs have been considered and

			actions reflect the needs of all residents.
Will there be an impact on transport, travel and connectivity?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be an impact on employment and income?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be an impact on education and skills?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be an impact on community safety?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.
Will there be an impact on the environment, air quality, climate change?	Neutral		The annual delivery plan will ensure these needs have been considered and actions reflect the needs of all residents.

If there are no adverse impacts or any issues of concern or you can adequately explain or justify them, please move to section 6.

Section 5

Where a potential negative impact has been identified, can continuation of the proposal be objectively justified? If yes, please explain your reasons.

At this stage no negative impacts are anticipated, however further ESHIA will be carried out for each action as they are undertaken and progressed through to delivery by the relevant officer

Section 6: Decisions or actions proposed

The assessment may result in some recommendations or suggestions to mitigate any negative impact and maximise positive impacts or actions to reduce the risk of an adverse impact.

n/a

Section 7: Monitoring arrangements

Who will be responsible for monitoring	Corporate Management Team
Frequency of monitoring	Monthly
Where will the impact assessment be reported to?	Cabinet as part of QPR
Where this impact assessment will be stored and for how long	By CMT for the life of the plan

Section 8: Summary of actions to mitigate negative impact (if required)

Impact Area	Action required	Lead officer/responsible person	Target date	Progress

Corporate Scrutiny Committee**Thursday, 6th February 2025****Report of the Leader of the Council****Quarter Three (Oct-Dec) 2024-25 Performance Report****Exempt Information**

None

Purpose

This report provides the Committee with an overview of Council performance for the third quarter of the 2024/25 financial year (October to December 2024). It reports the council's position in relation to progress with strategic corporate plan projects and updates on the financial position, corporate risks, audits, information governance, compliments, comments, complaints and health & safety. Cabinet will consider the report on 6th March 2025.

Recommendations

It is recommended that Corporate Scrutiny Committee endorse the contents of this report for consideration by Cabinet.

Executive Summary

This is the third quarterly performance report for 2024/25.

The report attached at appendix 1 contains the following sections:

1. Quarter 3 Highlight 2024/25
2. Strategic Projects Summary
3. Finance
 - 3.1 Financial Health Check Report – Period 9 December 2024
 - 3.2 Revenue Main Variances
 - 3.3 Capital Programme Monitoring
 - 3.4 Economic Wellbeing
 - 3.5 Medium Term Financial Strategy 2024/25 - 2029/30 Monitoring, December 2024
 - 3.6 Treasury Management Update – Period 9 2024/25
4. Corporate Risks
 - 4.1 Corporate Risks Detailed Summary Quarter 3 2024/25
 - 4.2 Detailed Corporate Risk Register Summary
5. Audit Plan update – End of Quarter 3
6. Information Governance Reports
 - 6.1 Personal Data Breaches
 - 6.2 Freedom of information (FOI) and Environmental Information Regulations (EIR) requests
 - 6.3 Subject Access Requests
 - 6.4 Comments, Compliments and Complaints
7. Health and Safety Q3 2024/25

Appendices

- Appendix 1 - Strategic Projects Highlight Reports

Resource Implications

There are no finance or human resource implications as a direct result of this report.

Legal/Risk Implications

An update on corporate risk is contained within the report at appendix 1.

Equalities Implications

A Equality, Social Inclusion and Health Impact Assessment is attached at appendix 2.

Environment and Sustainability Implications (including climate change)

There are no environmental or sustainability implications as a direct result of this report.

Report Author

Zoe Wolicki - Assistant Director People

Pardeep Kataria - Performance, Training and Information Officer

Appendices

Appendix 1 - Quarter 3 2024-25 Performance Report

Appendix 2 - Equality, Social Inclusion and Health Impact Assessment

Quarter 3 (Oct-Dec) Performance Report 2024/25

Contents





1. Quarter 3 Highlight 2024/25.....	1
2. Strategic Projects Summary	2
3. Finance	5
3.1 Financial Health Check Report – Period 9 December 2024	5
3.2 Revenue Main Variances.....	9
3.3 Capital Programme Monitoring	25
3.4 Economic Wellbeing	36
3.5 Medium Term Financial Strategy 2024/25 - 2029/30 Monitoring, December 2024	43
3.6 Treasury Management Update – Period 9 2024/25.....	46
4. Corporate Risks	53
4.1 Corporate Risks Detailed Summary Quarter 3 2024/25	53
4.2 Detailed Corporate Risk Register Summary	55
5. Audit Plan update – End of Quarter 3	92
6. Information Governance Reports	93
6.1 Personal Data Breaches.....	93
6.2 Freedom of information (FOI) and Environmental Information Regulations (EIR) requests	94
6.3 Subject Access Requests	96
6.4 Comments, Compliments and Complaints	97
7. Health and Safety Q3 2024/25.....	105
Appendices.	107
Appendix 1 - Strategic Projects Highlight Reports.....	107






1. Quarter 3 Highlight 2024/25


	Electoral register published and EU Voting and Candidacy Rights process completed		Equality and Diversity Strategy approved by full council
	Implementation of county boundary changes		Polling district and polling place review complete
	Staff survey completed		Processed pay award at short notice
	Staff conference held over 2 days – over 300 staff attended		Commenced Occupational Health contract review
	Reception refurbishment completed. Fixtures and fittings installation commenced.		Delivered statistically representative resident survey
	Delivered significant marketing for Christmas events (NEED DETAIL)		Finalists in LGC awards for delivering a new website within budget.
	Tender issued for CRM, customer portal and contact centre solution including AI and Robotic Process Automation (RPA) provision		Cyber Assessment Framework – achieved first set of requirements and £15,000 grant awarded
	Launched new assembly rooms website		Approval of updated H&S Policy
	Housing working group set up to address learning from complaints		90% call handling rate for general customer enquiries
	The Biodiversity Consideration adopted as part of the Nature Declaration Work		Footfall at Tamworth Castle during Halloween half term was up 69% on last year.
	Joint Waste Service- launch of the “Recycle for Good” Campaign		Fireworks event attended by 18,000 people, with cross departmental collaboration and support
	23/24 external audit of our statement of accounts was completed with an unqualified opinion issued		Developing broader links with partners including the deaf community
	In November Tamworth Castle achieved Learning outside the classroom (LOtC) quality standard for the thirteenth year running		We received £8,153.16 in Community infrastructure levy contributions in November
	Completion of security works at the Depot		Clean subsidy audit again for the Benefits Team.

2. Strategic Projects Summary





2.1 Corporate Plan 2022 - 25 Strategic Projects Overview Report

Code	Project	Projects Highlights (Overall Project Comments)	Status	Due Date	Managed By
CP2022-25_PD_34	Asset management Strategy	Cabinet approved Asset Management Strategy for implementation in November 2024. The next phase of the project for 205/26 will be the production of detailed Asset Management Plans for each asset which will be contained in the 2025/26 service plan.	 Completed	31-Oct-2024	Paul Weston
CP2022-25_TCP_04	FHSF	At the end of Q3 projects are starting to complete including the Peel Cafe project and Tec2. Nationwide are about to take possession of the Peel Cafe in January and the Tec2 building will be completed in January and ready for occupation soon afterwards. Flex is moving forwards with steels in place. St Edithas Square has commenced and has a 5 month programme which is on track. Discussions continue about the works to Middle Entry. Enabling works at Market Street are underway and designs are being worked up for a planning application in the New Year.		30-Sep-2025	Anna Miller
CP2022-25_PD_43	Financial Stability plan to resolve long term Medium Term Financial Strategy position	Budget and MTFS 2025/26 on track in line with timetable		31-Mar-2025	Joanne Goodfellow
CP2022-25_TCP_05	Gungate	Land assembly on Gungate North is progressing well to acquire SCC land/properties. Removal of the covenant on their youth centre property is finalised, allowing SCC to dispose of the Tamyouth Centre. Plans to split bingo hall from ATIK nightclub have been developed and negotiations with new nightclub owners are taking place. Gungate Briefing to Members and staff at the annual conference delivered.		31-Mar-2025	Anna Miller

Code	Project	Projects Highlights (Overall Project Comments)	Status	Due Date	Managed By
CP2022-25_PD_27	Housing Revenue Account (HRA) Business Plan (2024-2054)	HRA viability project forms part of the social housing regulatory programme and work is progressing on the baseline position impact assessment of the options to remedy with a view to report latest position to cabinet in Feb 2025 (TM)		31-Mar-2025	Tina Mustafa
CP2022-25_PD_08	Local Government Boundary Review	Kick off meeting taken place with Local Government Boundary Commission to outline project scope. Project to commence January 2025 and to conclude with all out elections in May 2028. Working group set up initial meeting arranged for 6 January 2025 to brief team and agree draft terms of reference.		31-Mar-2025	Zoe Wolicki
CP2022-25_TCP_07	Net Zero	Just awaiting formal sign off at Cabinet in January.		31-Mar-2025	Anna Miller
CP2022-25_PD_46	Response to Ankerside and organisational preparedness	The Council has now taken possession of the Centre and is in a period of stabilisation. Further work is to be done around the long term future of the centre.		31-Mar-2025 Completed	Paul Weston
CP2022-25_PD_47	Social Housing Regulatory Programme	Dedicated resourcing is in place until December 2025 to accelerate progress on the programme and this includes <ul style="list-style-type: none"> • Compliance review and remedy of overdue actions • Policy schedule being fast tracked • Service standards drafted for consultation and • Enhanced performance dashboard through Pentana 		31-Dec-2025	Tina Mustafa

CP2022-25_PD_48	Strategic Review of Leaseholder Service Charges	<p>The review and report produced by external consultants, Campbell Tickell has been approved by the Leasehold Working Group and was approved by Cabinet in October 2024.</p> <p>Consultations for the roofs that were part of the review commenced in December 2024 and will run through to February 2025.</p> <p>New process and suite of documents to become Business as usual.</p> <p>The formal Leasehold Service Charge policy is being produced by Campbell Tickell and will be presented to Cabinet for approval with the aim of implementation by April 2025.</p>		31-Mar-2025	Paul Weston
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Project Status Key

	Action completed
	Action not on track and not in control
	Action not on track but in control
	Action on track and in control

Appendix 1 contains detailed highlight reports on each project.

3. Finance

3.1 Financial Health Check Report – Period 9 December 2024

Executive Summary

This section to the report summarises the main issues identified at the end of December 2024.

General Fund

Revenue

GENERAL FUND	YTD Budget £000	YTD Position £000	YTD Variance £000	Full Year Budget £000	Predicted Outturn £000	Outturn Variance £000
Chief Executive	264	265	1	2	13	11
AD Growth & Regeneration	435	511	76	1,464	2,058	594
ED Organisation	100	111	11	-	10	10
AD Environ, Culture & Wellbeing	4,845	5,254	409	6,414	7,021	607
AD People	3,013	2,941	(72)	666	758	92
AD Policy & Performance	534	466	(68)	601	553	(48)
ED Finance	95	163	68	-	70	70
AD Finance	(595)	(1,304)	(709)	(2,350)	(3,982)	(1,632)
ED Communities	-	-	-	-	-	-
AD Assets	(1,057)	1	1,058	(696)	378	1,074
AD Neighbourhoods	415	592	177	1,025	1,146	121
AD Partnerships	606	626	20	1,057	1,150	93
Total	8,655	9,626	971	8,183	9,175	992

The General Fund has an unfavourable variance against budget at Period 9 of £0.971m (unfavourable variance of £0.128m as at Period 8). The projected full year position identifies an unfavourable variance against budget of £0.992m or 12.12% (unfavourable variance of £0.722m or 8.82% as at Period 8). Main overspends due to the shortfall in car park and planning income; lost rental from delays in opening the TEC and Flex building combined with an increase in Joint Waste costs, Assembly Rooms costs and an increase in bad debt provision for commercial properties.

Individual significant budget areas reflecting the variance and areas for concern are detailed at **s3.2**

Further commentary with regard to the shortfall in car park and planning income, and increased Joint Waste costs, can also be found at **s3.2**.

A balance of £95k was held in the General Contingency Budget at the end of December 2024 which, as part of the non-essential 'managed underspend' review, is forecast will not be fully required at year end and will result in a saving of £95k.

Balances

Balances on General Fund are projected to be in the region of £8.610m at the year-end from normal revenue operations compared to £9.185m projected within the 2024/25 budget report–reduced balances of £575k.

Capital

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000
AD Growth & Regeneration	17,267	13,138	10,011	(3,127)	17,517	14,934	(2,583)	2,596	17,530
AD People	471	552	264	(288)	736	443	(293)	293	736
AD Environment, Culture & Wellbeing	2,686	2,352	975	(1,378)	3,136	1,452	(1,684)	1,611	3,063
AD Finance	-	34	-	(34)	45	20	(25)	-	20
AD Assets	3,037	2,880	492	(2,387)	3,840	1,069	(2,771)	2,648	3,717
AD Neighbourhoods	-	34	46	11	46	46	-	-	46
AD Partnerships	-	8	10	3	10	10	-	-	10
GF Contingency	2,250	-	-	-	2,250	2,000	(250)	250	2,250
TOTAL GENERAL FUND	25,711	18,997	11,798	(7,200)	27,579	19,974	(7,606)	7,398	27,371

Capital expenditure incurred was £11.798m compared to a profiled budget of £18.997m (£11.515m compared to a profiled budget of £16.886m as at Period 8). At this point it is predicted that £19.974m will be spent by year end against a full year budget of £27.579m including re-profiled schemes from 2023/24 of £25.711m (£20.036m spend predicted against a full year budget of £27.597m as at Period 8). Re-profiling of £7.398m into 2025/26 is predicted at this stage, being £250k for GF Contingency, £186k for FHSF Castle Gateway, £2.130m Gungate Development, £190k works at the castle, £700k Amington Community Woodland, £350k Refurbishment of Anker Valley changing Rooms, £330k Balancing Ponds, £689k Town Hall improvement, £362k Commercial Lease Bolebridge and £1.520m Disabled Facilities Grant.

A summary of Capital expenditure is shown at **s3.3**.

Treasury Management

At the end of December 2024, the Authority had £64.302m invested in the money markets. The average rate of return on these investments is 5.06% though this may change if market conditions ease (4.85% when combined with property funds).

The Authority also has property fund investments of £1.849m with Schrodgers UK Real Estate Fund, £6.057m with Threadneedle Property Unit Trust, and £4.056m with Hermes Federated Property Unit Trust. The year to date returns on the property fund investments are 3.64% for Schrodgers, 3.56% for Threadneedle and 4.09% for Hermes.

Borrowing by the Authority stood at £63.060m at the end of December 2024, all being long term loans from the Treasury Public Works Loans Board. The average rate payable on these borrowings equates to 4.05%.

A more detailed summary of the Treasury Management situation, detailing our current Lending and Borrowings can be found at **s3.6**.

Housing Revenue Account (HRA)

Revenue

HOUSING REVENUE ACCOUNT	YTD Budget £000	YTD Position £000	YTD Variance £000	Full Year Budget £000	Predicted Outturn £000	Outturn Variance £000
HRA Summary	(17,859)	(17,847)	12	(12,775)	(12,841)	(66)
ED Communities	94	108	14	-	18	18
AD Environ, Culture & Wellbeing	287	295	8	419	428	9
AD People	157	137	(20)	-	(11)	(11)
AD Assets	930	908	(22)	554	568	14
AD Neighbourhoods	1,727	1,861	134	4,191	4,348	157
Housing Repairs	3,739	3,991	252	6,557	6,381	(176)
Total	(10,925)	(10,547)	378	(1,054)	(1,109)	(55)

The HRA has a unfavourable variance against budget at Period 9 of £378k (£474k favourable as at Period 8). This is mainly due to Housing Repairs year to date budget overspends. The predicted outturn underspend of £55k includes an underspend on Housing Repairs £176k

Capital

HOUSING REVENUE ACCOUNT	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000
AD Assets	4,335	11,572	6,401	(5,171)	15,377	10,872	(4,505)	4,130	15,002
HRA Contingency	100	75	-	(75)	100	-	(100)	100	100
							-		-
TOTAL HOUSING REVENUE ACCOUNT	4,435	11,647	6,401	(5,246)	15,477	10,872	(4,605)	4,230	15,102

Housing Capital expenditure of £6.401m has been incurred as at the end of Period compared to a profiled budget of £11.647m. At this point it is predicted that £10.872m will be spent by the year-end against a full year budget of £15.477m (including £4.435m re-profiled from 2023/24). Re-profiling of £3.430m is predicted at this stage being £915k High Rise Ventilation System, £330k Regeneration and New Build projects, £500k Works to achieve Zero Carbon, £500k Sheltered Lifts and Stairlifts renewals, £200k Disabled Facilities Adaptations, £200k Major Roofing Overhaul and Renewals and £100k HRA Contingency (£2.704m at Period 8).

A summary of Capital expenditure is shown at **s3.3**.

Balances

Balances on the Housing Revenue Account are projected to be in the region of £3.329m at the year-end compared to £3.585m projected within the 2024/25 budget report – reduced balances of £256k.

3.2 Revenue Main Variances

General fund

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Environment, Culture & Wellbeing	SPORT PITCHES	CONT TO RESERVES	0	0	0	0	40,000	40,000	Agreement for funds to go into sinking funds for future maintenance
		FEES & CHARGES 3G SPORTS	(19,929)	0	(19,929)	0	(40,000)	(40,000)	
	ACTIVE WELLBEING	CONT TO RESERVES	70,870	0	70,870	0	70,870	70,870	CIC Income to be put into reserves to fund future years staffing
		MISC CONTRIBUTIONS	(70,872)	0	(70,872)	0	(70,870)	(70,870)	Invoice to CIC Staffing Contribution
	ANKER VALLEY 3G PITCH	CONT TO RESERVES	17,745	0	17,745	0	40,000	40,000	Agreement for funds to go into sinking funds for future maintenance
		FEES & CHARGES 3G SPORTS	(17,745)	0	(17,745)	0	(40,000)	(40,000)	
	ASSEMBLY ROOMS	SALARIES	336,925	392,400	(55,475)	523,180	(50,000)	473,180	Vacant Posts
		WAGES	102,276	36,000	66,276	49,160	60,000	109,160	Casual staff being used to cover vacant posts
		SERVICE CONTRACTS	30,596	9,000	21,596	12,000	30,000	42,000	Spektrix costs increase with increased ticket sales
		PERFORMERS FEES	405,747	284,000	121,747	366,090	176,150	542,240	Post Covid more shows gone to % fees. Expenditure is 80% of tickets sales which is industry standard. Predicted outturn based on this industry standard and assuming that future show sell at 75% capacity.

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Environment, Culture & Wellbeing	ASSEMBLY ROOMS	TICKET SALES	(556,485)	(447,360)	(109,125)	(596,510)	(120,590)	(717,100)	Demand for tickets greater than when budget was set. Outturn figure assumes shows will sell tickets at 75% of full capacity.
		PRIVATE HIRE TICKET SALES	(3,963)	(72,390)	68,427	(96,530)	(32,590)	(129,120)	Outturn figure assumes shows will sell tickets at 75% of full capacity.
	ASSEMBLY ROOMS BAR	SALARIES	39,695	140,940	(101,245)	187,920	(40,000)	147,920	Vacant posts
		BAR SALES	(105,006)	(141,060)	36,054	(188,060)	30,000	(158,060)	Currently under review, continued analysis of mark up on stock
	PUBLIC SPACES	VACANCY ALLOWANCE	0	(86,670)	86,670	(115,500)	115,500	0	Vacancy Allowance. Full complement of staff so vacancy allowance won't be achieved.
	OAP GRASS CUTTING SERVICE	SALARIES	29,109	61,440	(32,331)	61,460	(4,430)	57,030	Vacant post covered by agency staff. This underspend is offset by agency spend.
	TBC LIGHTING MAINTENANCE	LIGHTING	51,230	38,430	12,800	51,230	35,000	86,230	Unmetered usage no longer subsidised by the Govt.
	JOINT WASTE ARRANGEMENT	REFUSE JOINT ARRANGEMENTS	1,488,195	1,346,010	142,185	1,794,690	189,570	1,984,260	Estimated outturn based on 2023/24 outturn assuming no more reserves available to meet increased costs

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Environment, Culture & Wellbeing	JOINT WASTE ARRANGEMENT	RECYCLING JOINT ARRANGEMENTS	344,328	450,000	(105,672)	600,000	(150,000)	450,000	On account payments received from SCC paid over to the Joint Waste Service. Final amount will be based on actual recycling from Tamworth residents assumed will be similar level to 2023/24 at £450k.
		RECYCLING CREDITS-SCC	(344,328)	(484,290)	139,962	(645,750)	195,750	(450,000)	Payments received on account in respect of recycling credits due from Staffordshire County Council. Total amount due will not be known until after year end and will be based on actual amounts recycled during the year. We have assumed at this point it will be in line with credits received for 2023/24 at £450k. This amount will then be paid over to Joint Waste Service on GW0804 46051
AD People	ICT	MFT LICENCE/MTCE/IMP	605,377	640,840	(35,463)	640,840	(35,000)	605,840	Contact Centre CRM & Customer Portal out to tender.
	CUSTOMER SERVICES	SALARIES	457,451	518,580	(61,129)	691,490	(15,000)	676,490	Vacancy of 2 post
		VACANCY ALLOWANCE	0	(32,670)	32,670	(43,600)	43,600	0	Vacancy Allowance

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Policy & Performance	MEMBER SERVICES	MEMBERS ATTEN ALLOW & FIN LOSS	197,935	221,530	(23,595)	351,030	(50,000)	301,030	Predicted underspend on member allowance
AD Assets	DISABLED FACILITIES GRANT-ADMI	PAYMENTS FOR TEMPORARY STAFF	127,400	90,000	37,400	120,000	20,000	140,000	Specialist Temporary Staff covering Vacant post.
	COMMERCIAL PROPERTY MANAGEMENT	PROVISION FOR BAD DEBTS	867,103	4,230	862,873	5,580	857,290	862,870	100% provision provided for 3 x unpaid Lease Rent invoices raised on 83310
		RECHARGE OF INSURANCE PREMIUMS	(41,303)	(8,400)	(32,903)	(8,400)	(33,030)	(41,430)	Insurance actuals higher than budgeted for. ZM undertook Insurance Valuation exercise identifying some units were grossly undervalued. This has resulted in invoices raised to recharge insurance to tenants of properties/unit to be higher than budgeted for
		RENTS	(1,331,920)	(1,615,000)	283,080	(825,250)	338,250	(487,000)	Usual quarterly invoice for Ankerside rent not raised as TBC took over running of centre 29/11/24. Income also expected to increase later in year for former F&B site however renting of site delayed

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Neighbourhoods	HOMELESSNESS	BED AND BREAKFAST COST	258,075	191,325	66,750	255,100	20,000	275,100	Overspend on B&B, some will be recovered from HPG, overspend due to increase in demand and due to voids turnaround being significant behind
		BED & BREAKFAST INCOME	(64,262)	(119,290)	55,028	(155,100)	72,000	(83,100)	Benefit payments are at the LHA one -bed rate per household, which does not cover the actual cost of B&B - the difference will be offset by the Homelessness Prevention Grants
	HOMELESSNESS STRATEGY	GOVERNMENT GRANTS	(343,706)	(379,070)	35,364	(379,570)	0	(379,570)	Homelessness Prevention Grant will support the B&B overspend
AD Partnerships	CAR PARKING ENFORCEMENT COSTS	SALARIES	0	59,310	(59,310)	79,050	(79,050)	0	To offset the temp staff payments
		PAYMENTS FOR TEMPORARY STAFF	41,688	0	41,688	0	57,000	57,000	Temporary staff funded from Salary budget
		STANDARD CHARGES	(25,889)	(90,990)	65,101	(121,350)	86,830	(34,520)	Budget based on historical collection level which will not be achieved this year, future years target to be considered as part of 25/26 MTFS.

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Partnerships	SAFER STRONGER COMMUNITIES FND	ASYLUM SEEKER DISPERSAL GRANT	34,802	87,961	(53,160)	194,500	(120,000)	74,500	Asylum Seeker Dispersal Grant not spent in 2024/25 to be put into reserves
		CONT TO RESERVES	0	0	0	0	135,600	135,600	Reserves for the unspent Asylum Seekers Dispersal grant
	COMMUNITY COHESION	COMMISSIONED PROJECTS	33,500	420,000	(386,500)	420,000	(386,500)	33,500	Project still under review - awaiting options appraisals
		CONT TO RESERVES	386,500	0	386,500	0	386,500	386,500	Unspent Community recovery funds
AD Growth & Regeneration	OUTSIDE CAR PARKS	SHORT STAY CAR PARKING	(637,801)	(817,010)	179,209	(1,107,000)	350,000	(757,000)	Delays in implementation of higher fees, resulted in an under recovery of income this year. A policy change has been included in the budget process 25/26, to reduce budget following consultation with Portfolio Holder
	MARKETS & STREET DISPLAYS	STREET TRADERS LICENCE INCOME	(325)	30	(355)	0	38,000	38,000	TBC have now adopted a Street Trading Policy, so more traders will fall within the remit of requiring consent. Currently in the first year of finding and invitation. Most have only just been invited to obtain consent due to the issues of relocation in the town centre.
	ENVIRONMENTAL HEALTH	VACANCY ALLOWANCE	0	(29,070)	29,070	(38,740)	38,740	0	Vacancy Allowance

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment	
AD Growth & Regeneration	STREET TRADING	STREET TRADERS LICENCE INCOME	(1,004)	(43,230)	42,227	(57,640)	0	(57,640)	TBC have now adopted a Street Trading Policy, so more traders will fall within the remit of requiring consent. Currently in the first year of finding and invitation. Most have only just been invited to obtain consent due to the issues of relocation in the town centre.	
	DEVELOPMENT CONTROL	FEES & CHARGES PLANNING APP	(54,401)	(128,250)	73,850	(171,000)	100,000	(71,000)	Reflects national picture, however, if new government proposals go through, the team will be generating more income in the latter half of the year, so under recovery on income not expected to change	
	TEC COLESHILL	RATES		(119,581)	83,210	(202,791)	83,210	(188,210)	(105,000)	£120k credit note, relating to 2023 charge, and expecting 2 months of rates for 2024
		RENTS		0	(99,360)	99,360	(132,500)	111,000	(21,500)	Building has not opened yet, so rents not received. Hoping to open Jan 2025
	THE FLEX BUILDING	RENTS		0	(48,240)	48,240	(64,310)	64,310	0	Building has not opened yet, so rents not received. Hoping to open May 2025

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
ED Finance	EXECUTIVE DIRECTOR FINANCE	SALARIES	139,491	99,360	40,131	132,430	41,000	173,430	Interim ED Finance arrangements, partly offset by underspend against AD Finance budget
AD Finance	CORPORATE FINANCE	GENERAL CONTINGENCY	0	0	0	95,000	(95,000)	0	No requirement to release budget identified
		CONT TO RESERVES	0	0	0	0	262,110	262,110	Contribution to business rates reserve based on estimate position
		AUDIT FEE	153,871	159,750	(5,879)	212,990	(50,000)	162,990	Expected underspend, full budgetary provision not likely to be required
		NNDR LEVY PAYMENTS	253,848	270,000	(16,152)	1,631,860	224,910	1,856,770	Additional levy payments based on year-to-date position
		GOVERNMENT GRANTS	(313,029)	(482,220)	169,191	(643,000)	0	(643,000)	Offset with Grants below
			(2,124,672)	(2,037,780)	(86,892)	(2,717,000)	255,690	(2,461,310)	S31 Business Rate Relief Grants, estimate based on latest position
		MISC CONTRIBUTIONS	(15,737)	0	(15,737)	0	(742,710)	(742,710)	Estimate returned levy from pool based on latest position
SAVINGS-SERVICE REVIEW	0	0	0	460,000	(460,000)	0	Offsetting commercial property bad debt provision		

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Finance	TREASURY MANAGEMENT	TREASURY MAN. RECHG TO HRA	0	0	0	(3,050,700)	64,120	(2,986,580)	Reduced recharge to HRA anticipated
		MISC INTEREST & DIVIDENDS	(2,297,266)	(1,399,770)	(897,496)	(1,866,350)	(1,197,000)	(3,063,350)	Expected interest above budget due to increased interest rates and additional balances to invest because of capital slippage
		PROPERTY FUND DIVIDENDS	(316,749)	(305,910)	(10,839)	(407,820)	(40,900)	(448,720)	Expected property fund dividends more than budget
	ACCOUNTANCY/TECHNICAL	SALARIES	303,137	277,940	25,197	351,500	56,000	407,500	Expected overspend due to interim arrangements
	AD FINANCE	SALARIES	46,881	72,990	(26,109)	97,360	(50,480)	46,880	Underspend due to interim ED Finance arrangements
	COUNCIL TAX	COURT COSTS	(172,171)	(131,220)	(40,951)	(175,000)	(25,000)	(200,000)	Additional Income received based on latest estimated position. Will be closely monitored till year end.
	BENEFITS	PROVISION FOR BAD DEBTS	0	10,000	(10,000)	10,000	(85,000)	(75,000)	Expected reduction in bad debt provision based on year to date position

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Finance	BENEFITS	RENT ALLOWANCES/PT GRANT & PT OVERPAYMENT RECOVERY	125,211	58,290	66,921	75,880	58,260	134,140	Predicted outturns based on DWP Estimate Claim as at P9
		COUNCIL TENANT RENT REBATES/CT GRANT/OVERPAYMENT CT/CT OVERPAYMENT RECOVERY	43,737	(39,950)	83,687	(56,110)	59,780	3,670	
	BENEFITS ADMINISTRATION	VACANCY ALLOWANCE	0	(32,310)	32,310	(43,040)	43,040	0	Vacancy Allowance

Housing Revenue Account – Main Variances

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
AD Assets	REPAIRS CONTRACT	SALARIES	256,935	310,590	(53,655)	414,140	(40,000)	374,140	Vacant hours, some of the underspend is to offset the cost Temp staff
Executive Director Communities & Housing	HRA CLEANERS	SALARIES	242,533	287,640	(45,107)	383,460	(18,000)	365,460	Agency cover spend of £27k and £4k Compensation payment can be offset against salary underspend. Long term sickness also contributing to underspend. Budget also includes one off budget of £40k for 2024/25 only for help towards Agency cover with some remaining unspent.
AD Neighbourhoods	INCOME MANAGEMENT	VACANCY ALLOWANCE	0	(27,270)	27,270	(36,340)	36,340	0	Vacancy Allowance
Housing Repairs	REPAIRS CONTRACT	RESPONSIVE REPAIRS	2,759,879	1,730,000	1,029,879	2,230,000	610,000	2,840,000	Overspend due to increases in PPP prices and other uplifts. The fund shortage will be covered by underspend on other lines as well as reserves

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
Housing Repairs	REPAIRS CONTRACT	VOIDS	843,351	975,000	(131,649)	1,300,000	0	1,300,000	It is expected that the budget will be spent in full. There are still jobs on the system for £170k and it's expected that majority of these will be completed this year.
		BRICKWORK & SPALLING	24,680	75,638	(50,958)	100,850	(75,850)	25,000	The budget will not be spent in full, the underspend to offset overspends on Responsive repairs
		LIFT MAINTENANCE	7,481	56,250	(48,769)	75,000	0	75,000	Payments for previous year's accrual are still outstanding. Equans to close jobs on Orchard to enable payments
		MISC. (NON SPECIFIC)	22,351	60,000	(37,650)	80,000	0	80,000	Fire stopping to Glenfield sheltered accommodation has not started but it will be completed this year and budget will be spent in full
		CONTRIBUTION FROM RESERVES	(650,000)	(650,000)	0	(650,000)	(300,000)	(950,000)	Reserves to support the overspend on Responsive repairs
		RECHARGABLE WORKS	(109,313)	0	(109,313)	0	(109,313)	(109,313)	Charges to tenants for damages caused to properties

Service Area	Cost Centre	Account Code	Year to Date Position	Year to Date Budget	Year to Date Variance	Full Year Budget	Predicted Outturn Variance	Full Year Position Predicted Outturn	Comment
Housing Repairs	REPAIRS	FIRE FIGHTING EQUIPMENT	(41,847)	75,000	(116,847)	100,000	(100,000)	0	Accrual from the previous year overestimated by approx £110k, underspend to support overspend on other lines
		ASBESTOS REMOVAL	92,354	187,500	(95,146)	250,000	(100,000)	150,000	The payment made for some Asbestos inspections. Awaiting invoice for Glenfield
		DISREPAIR COSTS	208,042	112,500	95,542	150,000	70,000	220,000	Overspend on legal and settlement fees - cost to be offset with underspend on other lines.
HRA Summary	H R A SUMMARY	PROVISION FOR BAD DEBTS	359,241	277,470	81,771	370,000	0	370,000	Currently overspent but following rent free weeks in December and March this cost will stay within the budget
		ITEM 8 DEBIT	0	0	0	3,050,700	(64,120)	2,986,580	Reduced recharge recharge re Treasury Management
		CONTRIBUTION FROM RESERVES	(67,875)	0	(67,875)	0	(67,875)	(67,875)	Review of unused reserves, as approved by Cabinet
		RENTS	(17,757,496)	(17,796,070)	38,574	(22,947,540)	50,000	(22,897,540)	Higher level of voids than budgeted for

General Fund – Policy Changes Savings / Additional Income

Cost Centre	Account	2024/25 POLICY CHANGES	2024/25 Management Budget	Predicted Outturn Variance	Predicted Outturn	Comment
ASSEMBLY ROOMS	BROADCAST INCOME	(2,500)	(18,880)	0	(18,880)	Additional income expected in year
OUTSIDE CAR PARKS	SHORT STAY CAR PARKING	(307,000)	(1,107,000)	350,000	(757,000)	Delays in implementation of higher fees, resulted in an under recovery of income this year. A policy change has been included in the budget process 25/26, to reduce budget following consultation with Portfolio Holder
THE FLEX BUILDING	RENTS	(64,310)	(64,310)	64,310	0	Building has not opened yet, so rents not received. Hoping to open May 2025
CORPORATE FINANCE	CONSULTANTS FEES	(50,000)	0	6,500	6,500	£6.5k committed for Link Advisory service on investment options appraisal. No further spend expected

GENERAL FUND OVERSPENDS

Car Parking Income

Car parking income has been rising steadily following a substantial loss of income during and immediately after covid. The current forecasted income for 2024/25 is £757k against a budget of £1,107k.

The income budget for 2024/25 was increased substantially (by £307k) as part of the MTFS process and unfortunately income is falling short, despite projections in excess of the actual amount received in 2023/24 (£748k).

The budget was set higher for 2024/25 for two reasons. In January 2024 TBC bought the NCP car park and an increase in the budget was made to reflect additional income. However, there is an overprovision of car parking in the town, and income has not increased to any significant degree. Cabinet at the end of 2023 also approved an increase in car parking fees and charges, which was the first increase in 11 years. Because of the time that had lapsed since the last fee increase, the legal changes to the traffic regulation orders on the car park unfortunately took a long time to deliver. Rather than the increased fees and charges starting in April at the beginning of the new financial year, it was in fact November when the team were able to complete the legal paperwork. The new fees and charges will have a positive impact on the income.

A policy change to reduce the income budget by £207k in 2025/26 has been submitted as part of the budget process. This is partly offset by additional income of £90k proposed in respect of season tickets and additional parking permits, required by the college when the building opens in 2025. In addition, if agreed, further additional charges are being explored for Sunday and evening parking.

Planning Income

Planning income very closely follows economic cycles. During economic boom years, residents, businesses and developers apply for planning consents because there is less financial risk/more financial stability generally. Economically the country has been doing less well in recent years due to the impact of covid, impact of Brexit and now the cost of living crisis. Inflation and the cost of materials in particular will be putting people off making large financial commitments. Not being able to plan long-term is a barrier.

Planning income therefore quite closely follows the economic health of the country. Coupled with this is the fact that Tamworth has run out of land for large scale development which generate the most fees. This finite resource will permanently limit fee income from this point forwards. As at period 9, a shortfall of £100k in planning fee income is projected.

Recognising this issue, a policy change has been put forward to mitigate the impact on the budget, by increasing fees for name and numbering services. Secondly and significantly the Government has recently consulted on a revised NPPF which seeks to potentially increase the householder fee which is a national rate. This is significant for Tamworth because the majority of fee income is from householder or other small applications. The team calculated that potentially £40k per year could be generated by the fee increase which could in future years close some of the gap between budget and fees.

To close the gap this year the team are aware of a number of medium sized applications that have the potential to be submitted before outturn. In addition, new fees in response to the consultation on the NPPF are likely to come in immediately thereby generating additional income.

In future the budget for planning fees and charges will be kept under review to ensure realistic planning assumptions going forward.

Joint Waste Unit

The contribution payable to Lichfield DC for 2024/25 has increased from £1.795m to £1.984m, and we are currently projecting an outturn overspend of £189k as a result. A policy change has been put forward to increase the budget for 2025/26 and future years, due to increased costs of staffing, vehicles, fuel, etc. Reserves currently held are being applied to mitigate the impact of these increased costs in the short term. We are also working with Lichfield to look at how costs can be managed in the future and regular budget monitoring and management meetings are now in place.

To mitigate the impact of increasing costs and pressure on the MTFs, an increase in the Garden Waste collection charge to £41 with effect from January 2024 has recently been approved. This is the first inflationary increase since the charge was established and brings us into line with Lichfield and better reflects the actual cost of the service. It was further agreed that inflationary increases will be applied on an ongoing basis.

3.3 Capital Programme Monitoring

Capital Programme Monitoring – General Fund

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Growth										
Gungate Development	2,184	1,638	30	(1,608)	2,184	54	(2,130)	2,130	2,184	Progressing the scheme, budget will not be spent. Reprofile to next year, retain £50K for consultant support this year.
FHSF Castle Gateway	5,784	4,338	3,858	(480)	5,784	5,598	(186)	186	5,784	Projection in line with latest DLUHC return. FHSF grant to be spent by March 25 but envisaging to have approximately £186k reprofiled
FHSF Middle Entry	5,843	4,382	2,728	(1,654)	5,843	5,843	-	-	5,843	Latest projection to DLUHC reported that budget would be committed in full this year. FHSF grant to be spent by March 25
FHSF College Quarter	3,198	2,398	3,220	821	3,198	3,211	13	-	3,211	Latest projection to DLUHC reported that budget would be committed in full this year. FHSF grant to be spent by March 25. Budget currently looks overspent by £21k. However, there is a potential plan to re-allocate budgets within FHSF to accommodate this overspend.
Capital Repairs Programme - Castle	73	242	88	(155)	323	133	(190)	190	323	This is for the scaffolding at the castle, which should go ahead after August 2024 (there have been delays, due to waiting on the Financial Waiver). £190k to be reprofiled into 2025/26.
Fire and Intruder Alarm Renewals at Tamworth Castle	54	40	44	4	54	49	(5)	5	54	The Tender went out successfully, however, the tender is very technical. Therefore, an external person will need to be hired to find the best Tender. This will hopefully be spent this year but will need to find someone to appoint first. £5k is likely to be reprofiled
Heating Renewals at Tamworth Castle	38	28	38	9	38	38	-	-	38	This has already been committed and will be spent in 24/25.
Roofing Renewal at Tamworth Castle	94	70	5	(65)	94	9	(85)	85	94	This took a while to get the costs within budget, however, it is now at the point where we can appoint someone to do the work and should be started Jan 2025. The remainder of the Roofing to be completed next year so will need to reprofile £85k into 2025/26.
Service Area Total	17,267	13,138	10,011	(3,127)	17,517	14,934	(2,583)	2,596	17,530	

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD People										
Replacement It Technology	25	64	33	(31)	85	35	(50)	50	85	The main remaining spend is for consultancy services associated with a couple of ICT strategy projects including Azure migration, SharePoint/OneDrive implementation and server/storage infrastructure refresh work. This may start early next calendar year but will go into 25/26 and be put together with a new request for capital to fund these projects over the next 18 months. possible reprofile into 2025/26 will be about £50k
Endpoint & Web E-Mail Filter	12	9	-	(9)	12	-	(12)	12	12	The remaining budget was for firewall replacement/mobile device AV/Anti Malware, we are in the process of POC/testing both . Work not commenced so Full budget to be reprofiled to 25/26.
Asset Management Database	41	31	2	(28)	41	36	(5)	5	41	Consultancy and training fees expected. Unlikely to spend full budget. £30k has now been contracted. £5k to be reprofiled to 25/26
R & R Smart Working IT Requirements	250	188	229	41	250	230	(20)	20	250	This is for desktop technology refresh - contract just awarded - £73k and network hardware refresh £155k - supplier about to be appointed. Possible £20k to be reprofiled to 2025/26.
ICT Audio/Visual Technology Town Hall	87	65	-	(65)	87	87	-	-	87	Reviewing tender responses. Looking to raise an order by end of year. Budget will be fully spent if successful.
Civica Digital Image Store	56	42	-	(42)	56	-	(56)	56	56	This has been re-purposed towards the project below - Civica EDM System upgrade. We're in the process of consultation with service areas to understand requirements. Upon review, work is not likely to commence until next financial year due to the tender process.
Civica EDM System upgrade	-	112	-	(112)	150	-	(150)	150	150	Civica EDM System upgrade is re-purpose with Civica Digital image We're in the process of consultation with service areas to understand requirements. Upon review, work is not likely to commence until next financial year due to the tender process.
CRM & Customer Portal and Contact Centre	-	15	-	(15)	20	20	-	-	20	Spec currently being developed, ITT will then be produced for procurement. Tender in process. Spend will depend on how quickly the tender is processed. To be reviewed in March. May need to reprofile some budget into 2025/26.
Telephony schemes	-	26	-	(26)	35	35	-	-	35	Spec currently being developed, ITT will then be produced for procurement. Tender in process. Spend will depend on how quickly the tender is processed. To be reviewed in March. May need to reprofile some budget into 2025/26.
Service Area Total	471	552	264	(288)	736	443	(293)	293	736	

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Environment Culture & Wellbeing								-		
Wigginton Park Section Section 106	11	9	-	(9)	11	-	(11)	11	11	Staffing shortages, which has meant that they have been unable to chase the volunteers' group in delivering their management plan. we now have new staff in post, hoping to deliver by the end of the year. This budget will now not be spent. Reprofile full budget to next year.
Broadmeadow Nature Reserve	11	8	-	(8)	11	-	(11)	11	11	Budget will not be spent this year. Reprofile full budget to next year. Relates to S106 agreements.
Public Open Space Section 106	27	20	-	(20)	27	-	(27)	27	27	Delays in identifying projects due to staffing shortages, however, we now have new staff in post. Budget will not be spent this year. Reprofile full budget to next year.
Street Lighting	303	317	31	(286)	423	423	-	-	423	Ongoing 40 year + replacement scheme, delays likely to planned works. EON not being very forthcoming with any information, despite being chased. Will review in February.
Local Nature Reserves	24	18	-	(18)	24	-	(24)	24	24	Grant funding HLS from Rural Payments Agency. On going work taking place so to be reprofiled full budget to next year. Look to work with SWT to support works on nature reserves.
Amington Community Woodland	757	568	27	(540)	757	57	(700)	700	757	On hold due to issues on site with levels - with Planning. Possible reprofile for most of the amount.
Refurbishment of Play Areas	87	103	79	(25)	137	79	(58)	58	137	Work at Rainscar and Beauchamps is completed, now working on the next projects with tender to be out early January 2025. Reprofile remaining budget to next year.
Balancing Ponds	230	248	-	(248)	330	-	(330)	330	330	Ongoing discussions with Environment Agency re disposal of silt from Falcon holding pond. This should be reprofiled to 2025/26. Balancing pond survey at end of January 2025.
Boardwalk Warwickshire Moor	20	15	-	(15)	20	-	(20)	20	20	Budget will not be spent this year. Reprofile full budget to next year. Relates to S106 agreements.
Snowdome Footbridge	-	60	-	(60)	80	80	-	80	160	New project in 24/25. Currently the team are gathering and evaluating information to establish the breadth / scope of the project. Options being requested- full steel construction, steel frame with recycled walkway and a like for like replacement.
Improved security at Depot including gates, alarms and access	114	85	38	(47)	114	41	(73)	-	41	Work progressing well and should be completed by end of Dec 24. There will be an underspend of £73k. This will go towards savings.

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Environment Culture & Wellbeing								-		
Refurbishment of Anker Valley changing rooms	250	263	-	(263)	350	-	(350)	350	350	Work can't start until the pitch has been completed. There is a request for more funding as part of the 2025/26 budget process. Full budget to be reprofiled to 2025/26.
Installation of 3G pitches at Anker Valley	802	602	800	198	802	802	-	-	802	Works started in April 24 and budget will be fully spent. Fully spent and 3G pitch installed.
Renewal of Lighting at Depot	50	38	-	(38)	50	50	-	-	50	Work was dependent on security works being completed first. Once tenders awarded for security, we should be in a position to start on this project. Budget will be spent. Works complete.
Service Area Total	2,686	2,352	975	(1,378)	3,136	1,532	(1,604)	1,611	3,143	
AD Finance										
GF Capital Salaries	-	34	-	(34)	45	20	(25)	-	20	Budget will not be fully spent. Potential savings
Service Area Total	-	34	-	(34)	45	20	(25)	-	20	
AD Assets										
Disabled Facilities Grant	1,700	1,763	439	(1,324)	2,350	830	(1,520)	1,520	2,350	The in-house service is progressing well but is still, dealing with the backlog of cases passed by Millbrook. It is estimated that £600k worth cases will be processed and completed this year. Additional cost of recharges for running the services is est. £230k. Predicted underspend, which will be reprofiled is £1,520k - this is reviewed on the monthly basis. Potential £120k payment will be required to Millbrook, this is currently being dealt with by the solicitor.
Energy EFF Upgrade Commercial and Industrial Properties	-	56	-	(56)	75	30	(45)	-	30	Due to new regulation we have to provide updated EPC for the re-let properties - none has been requested as yet. Some of this budget is still needed so that any new voids can be assessed prior to letting. £45k identified total savings.

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Assets										
R & R Office Requirements	140	105	42	(63)	140	140	-	-	140	Cabinet has now approved the opening of the reception area. A Project Board is in place and a project is being worked on which will include alterations and improvements to the reception area and toilet. Work has now commenced on the reception area and likely to be completed by year end
Town Hall Improvements	689	517	6	(511)	689	-	(689)	689	689	Project on hold. This is now linked to the decision to move committee meetings back to Marmion House. Decision to be made as to whether to continue with project (unlikely to commence in the current financial year) or whether it will be pulled and create savings.
Roofing and renewal of walkways to Caledonian shop	85	66	-	(66)	88	-	(88)	44	44	Project on hold due to Strategic Leasehold Review. Report sent to Cabinet 10/10/24 regarding Leaseholder service charges. Awaiting outcome of recommendations from Cabinet before progressing with the scheme. Project should commence this year but not guaranteed to be completed by March 25 so approx 50% to be reprofiled in to 2025/26.
Roofing and renewal of walkways to Ellerbeck	56	50	-	(50)	67	-	(67)	34	34	Project on hold due to Strategic Leasehold Review. Report sent to Cabinet 10/10/24 regarding Leaseholder service charges. Awaiting outcome of recommendations from Cabinet before progressing with the scheme. Project should commence this year but not guaranteed to be completed by March 25 so approx 50% to be reprofiled in to 2025/26.
Commercial Lease Bolebridge	368	276	6	(270)	368	6	(362)	362	368	New project started in 2023-24, Acquisition completed. Lease document has now been signed. Remaining budget may not be used this year and should be reprofiled to 25/26.
Roofing Renewal at Tamworth TEC	-	48	-	(48)	63	63	-	-	63	New project. Wates have been appointed to complete this work. Awaiting confirmation of the start date.
Service Area Total	3,037	2,880	492	(2,387)	3,840	1,069	(2,771)	2,648	3,717	

GENERAL FUND	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Neighbourhoods										
CCTV Infrastructure	-	34	46	11	46	46	-	-	46	In year works for project completed. Payment made to WMCA for 2024/25 CCTV shared services contribution.
Service Area Total	-	34	46	11	46	46	-	-	46	
AD Partnerships										
Staffordshire 3 Memorial	-	8	10	3	10	10	-	-	10	Payment made for the manufacture of a lasting bronze memorial dedicated to The Staffordshire 3.
Service Area Total	-	8	10	3	10	10	-	-	10	
GF Contingency										
Gf Contingency	100	-	-	-	100	-	(100)	100	100	No plans to release funds identified as yet, to be re-profiled if unspent.
Cont-Return On Investment	20	-	-	-	20	-	(20)	20	20	No plans to release funds identified as yet, to be re-profiled if unspent.
GF Contingency Plant and Equipment	100	-	-	-	100	-	(100)	100	100	No plans to release funds identified as yet, to be re-profiled if unspent.
GF Contingency Castle Curtain Wall	30	-	-	-	30	-	(30)	30	30	No plans to release funds identified as yet, to be re-profiled if unspent.
GF Contingency Middle Entry Costs	2,000	-	-	-	2,000	2,000	-	-	2,000	May not be required depending on agreement with regard to options for Middle Entry, in which case to be re-allocated to Gungate scheme.
Service Area Total	2,250	-	-	-	2,250	2,000	(250)	250	2,250	
GENERAL FUND TOTAL	25,711	18,997	11,798	(7,200)	27,579	20,054	(7,526)	7,398	27,451	

Capital Programme Monitoring – Housing Revenue Account

HOUSING REVENUE ACCOUNT	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Assets										
Structural Works	100	225	18	(97)	300	150	(150)	150	300	Most works put through this budget are done on an ad-hoc basis arising from structural defects identified by the repairs team. There are currently a number of projects with the contractor(s) for pricing. Looking into replacement of flooring at 6 Masefield Blocks. £150k to be reprofiled to 25/26.
Bathroom Renewals	-	431	292	(139)	575	575	-	-	575	Budget will be spent in full by year-end, work on track. Wates struggle with their contractor but there are no concerns about completing the project. Equans were given more jobs, invoices have started coming through. Work is ongoing.
Gas Central Heating Upgrades and Renewals	89	581	(6)	(587)	675	475	(200)	-	475	Boiler install as per programme. Heating upgrades at Sheltered scheme Ankermoor and Eringden in addition to ongoing boiler and electric heating renewal - 2024/25 original budget will be spent in full but possible savings due to overestimated accrual from 2023/24.
Kitchen Renewals	168	651	608	(43)	868	868	-	-	868	Budget will be spent in full by year-end, work on track. Wates struggle with their contractor but there are no concerns about completing the project. Equans were given more jobs, invoices have started coming through. Work is ongoing
Major Roofing Overhaul and Renewals	40	1,343	1,317	(26)	1,890	1,690	(200)	200	1,890	Most of the budget relates to works that has been issued to Wates and is currently on track and due to complete by year-end. Project was due for completion by year-end, however £200k is being reprofiled to 25/26.
Window and Door Renewals	-	300	319	19	400	400	-	-	400	Some of the budget will support the Eringden fire windows replacement, £360k worth work plan was issued to Wates. Budget will be spent in full.

HOUSING REVENUE ACCOUNT	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Assets										
Neighbourhood Regeneration	6	200	156	(44)	266	266	-	-	266	Projects are still being actively identified by the team. There has been a lack of bids for this work in the current financial year. Awaiting costing from Wates
Disabled Facilities Adaptations	225	694	395	(298)	925	725	(200)	200	925	The current requirements for the work is £1,1m, £600k will be completed this year. In addition, there will be a cost of recharges £125k. Still dealing with backlog of jobs from previous years and year end accrual. £200k to be reprofiled to next year.
Rewire	330	323	400	78	430	430	-	-	430	Awaiting results from the condition reports (EICR), budget will be required to address issues arising from inspections. Some of the budget to be used for rewiring at the properties where roofs were upgraded, In addition due to changes in best practice the plastic consumer boxes have to be upgraded to metal. Work will be completed by year end.
CO2 / Smoke Detectors	-	48	51	3	64	64	-	-	64	Awaiting results from the condition reports (EICR), budget will be required to address issues arising from inspections.
Insulation	18	13	13	(1)	18	18	-	-	18	This budget is linked with the roofing programme and is being used to improve the insulation in properties where roofing works are completed.
Works to Achieve zero Carbon	-	750	-	(750)	1,000	1,000	-	500	1,500	Consideration to make this a two year programme. The specification and property lists are with the contractors for pricing. Costings have now been received and awaiting work commencement. 50% of the budget to be reprofiled to next year.

HOUSING REVENUE ACCOUNT	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Assets										
Renewal of Roofing at Eringden	185	139	93	(46)	185	93	(93)	93	185	Project on hold due to Strategic Leasehold Review. Report gone to Cabinet regarding Leaseholder service charges. This is linked to work at Eringden. The decision made by Cabinet will determine the project delivery timetable. £92.5k to be reprofiled.
Renewal of Windows at Eringden	87	87	44	(44)	87	44	(44)	44	87	Budget has been fully committed on this project. Some immediate works have been released. Work has however not completed. Some budget will be reprofiled to 25/26.
Roofing and renewal of walkways to Caledonian shops (HRA)	127	99	-	(99)	132	66	(66)	66	132	Project on hold due to Strategic Leasehold Review. Report sent to Cabinet 10/10/24 regarding Leaseholder service charges. Awaiting outcome of recommendations from Cabinet before progressing with the scheme. Project should commence this year but not guaranteed to be completed by March 25 so approx 50% to be reprofiled into 2025/26.
Roofing and renewal of walkways to Ellerbeck (HRA)	167	150	-	(150)	200	100	(100)	100	200	Project on hold due to Strategic Leasehold Review. Report sent to Cabinet 10/10/24 regarding Leaseholder service charges. Awaiting outcome of recommendations from Cabinet before progressing with the scheme. 50% to be reprofiled into 2025/26.
Sheltered Schemes	68	51	52	2	68	68	-	-	68	The Assets Team is working with the Sheltered Housing team to finalise projects to take up full spend. Work will be completed by year end.
Energy Efficiency Improvements	69	69	69	0	69	69	-	-	69	This project is linked to the loft insulation and Windows replacement at Eringden as set out above. Work has now been completed with full budget spent.
Install Fire Doors High Rise	-	304	244	(60)	405	405	-	-	405	Lower rise blocks, the budget is fully allocated to the programme. Work started in July and is expected to be complete before year end.

HOUSING REVENUE ACCOUNT	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Assets										
High Rise Ventilation System	-	1,286	-	(1,286)	1,715	-	(1,715)	915	915	Due to links with other projects and the need to involve the Building Safety Regulator, it is not possible to complete this project in the current financial year. Project will need to be deferred until 2025/26 with budgets being reprofiled.
Fire Risk Mitigation Works	-	225	132	(93)	300	300	-	-	300	Works that have previously been identified have been completed. New FRAs are in the process of being completed and budget will be required to address issues arising from those surveys.
Damp & Mould Works	172	204	161	(43)	272	272	-	-	272	This is largely an ad-hoc budget that is used to address major repairs arising from Damp and Mould cases either reported through the repairs team or that have been identified as a disrepair case. Budget will be spent in full.
High Rise Refuse Chute Renewals	-	113	-	(113)	150	-	(150)	-	-	This budget is no longer required and can be offered up as a saving.
Sheltered Lifts and Stairlift Renewals	612	646	56	(590)	862	362	(500)	500	862	Stairlifts identified through the service programme will be renewed. Quotations are being produced for the renewal of lifts in three sheltered schemes based on known age and condition. Work would not be fully completed by year end. £500k to be reprofiled to 25/26.
Fire Alarm Panel Renewals	50	38	-	(38)	50	25	(25)	25	50	The team are waiting on final designs and costings for this project. £25k to be reprofiled.
Upgrade Pump Room at High Rise	25	19	-	(19)	25	-	(25)	-	-	The team are waiting on final designs and costings for this project. This budget is being offered up as savings.
Internal flooring decoration at Eringden	-	68	-	(68)	90	90	-	45	135	Project on hold due to Strategic Leasehold Review. Report sent to Cabinet 10/10/24 regarding Leaseholder service charges. Awaiting outcome of recommendations from Cabinet before progressing with the scheme. 50% to be reprofiled into 2025/26.

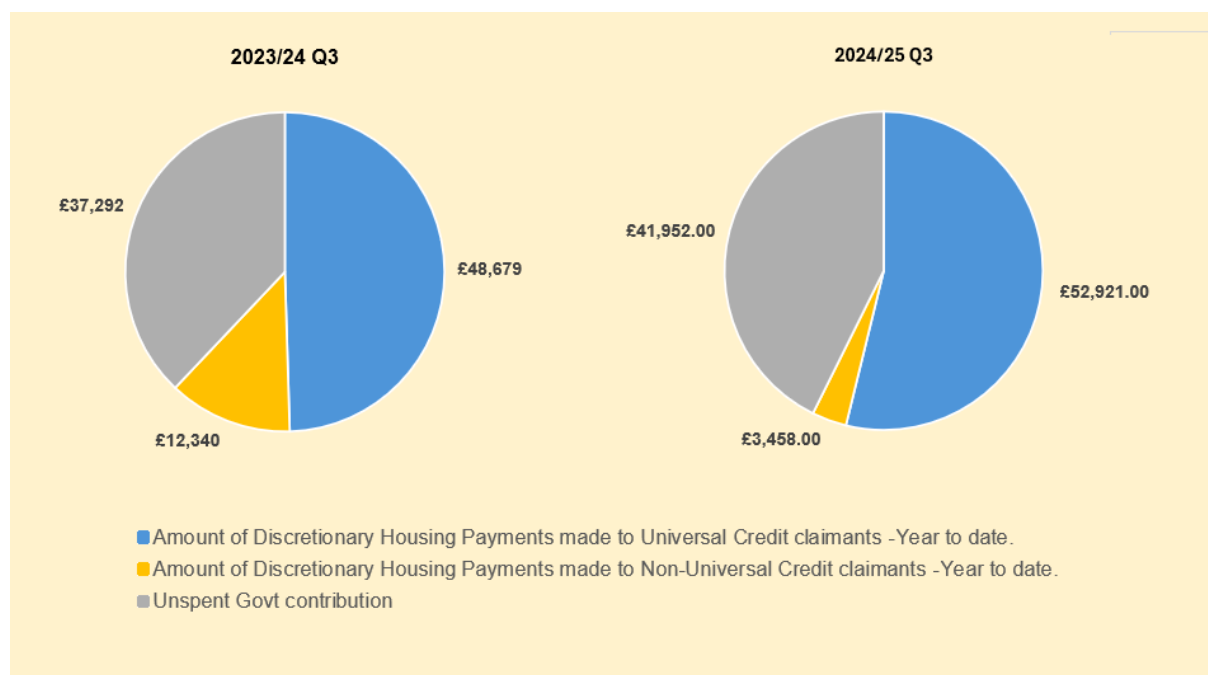
HOUSING REVENUE ACCOUNT	Budget Reprofiled from 2023/24 (memo only) £000	YTD Budget £000	YTD Actual Spend £000	Variance £000	Budget £000	Predicted Outturn £000	Variance £000	Reprofile to 2025/26 (memo only) £000	Outturn £000	Comments
AD Assets										
Retention of Garage Sites	-	698	930	233	930	930	-	-	930	Budget for the garage demolition/upgrades/replacement has been fully allocated. It is anticipated that the work will be completed. Budget is all spent now on this project.
Capital Salaries	-	150	-	(150)	200	200	-	-	200	Year-end recharge
Software Fire Safety Surveys	-	-	-	-	-	-	-	-	-	-
HRA Street Lighting	392	429	32	(398)	572	572	-	-	572	This project is with Street Scene. Ongoing 40 year + replacement scheme, delays likely to planned works. EON not being very forthcoming with any information, despite being chased. To be reviewed.
Asset Management Software HRA	8	6	0	(6)	8	8	-	-	8	Additional requirement has been identified, and budget will be spent in full.
Telecare System Upgrades	66	49	37	(12)	66	66	-	-	66	Digital upgrades. Tunstall provided a quote for 16 sites (2.3k per site). Work with Tunstall ongoing.
Regeneration & Affordable Housing	1,052	977	764	(213)	1,302	972	(330)	330	1,302	A 6-flat refurbishment development has been agreed at a site on Watling Street. This is due to commence later this year but is unlikely to handover until 2025/26. Other acquisition opportunities will be pursued.
Caledonian Depot New Build	278	209	115	(94)	278	115	(163)	163	278	This project is now completed, and remaining budget relates to retention payments that will be released at the end of the defects period.
Service Area Total	4,335	11,572	6,401	(5,171)	15,377	11,417	(3,960)	3,330	14,747	
HRA Contingency										
HRA Contingency	100	75	-	(75)	100	-	(100)	100	100	To be re-profiled
Service Area Total	100	75	-	(75)	100	-	(100)	100	100	
HRA Total	4,435	11,647	6,401	(5,246)	15,477	11,417	(4,060)	3,430	14,847	

3.4 Economic Wellbeing

Quarterly updates are presented to monitor economic wellbeing and the impact on Council services including customer demand via monitoring of calls/contacts together with the financial impact of collection and demand for benefits and effect on income streams such as rent, council tax and business rates.

Benefits

The Authority has received £98,331 Discretionary Housing Payments (DHP) grant from the DWP for 2024/25. This is allocated to those tenants (both public and private sector) most in need who fall into difficulty with their housing costs. The grant is expected to be fully allocated by the end of the financial year. A reduction in the number of Discretionary Housing Payments (DHP) claims is reported - DHP claims paid are £56k (£61k at 31st December 2023) with 59 successful claims from 182 applications (compared to 83 successful claims from 206 applications at 30th December 2023).

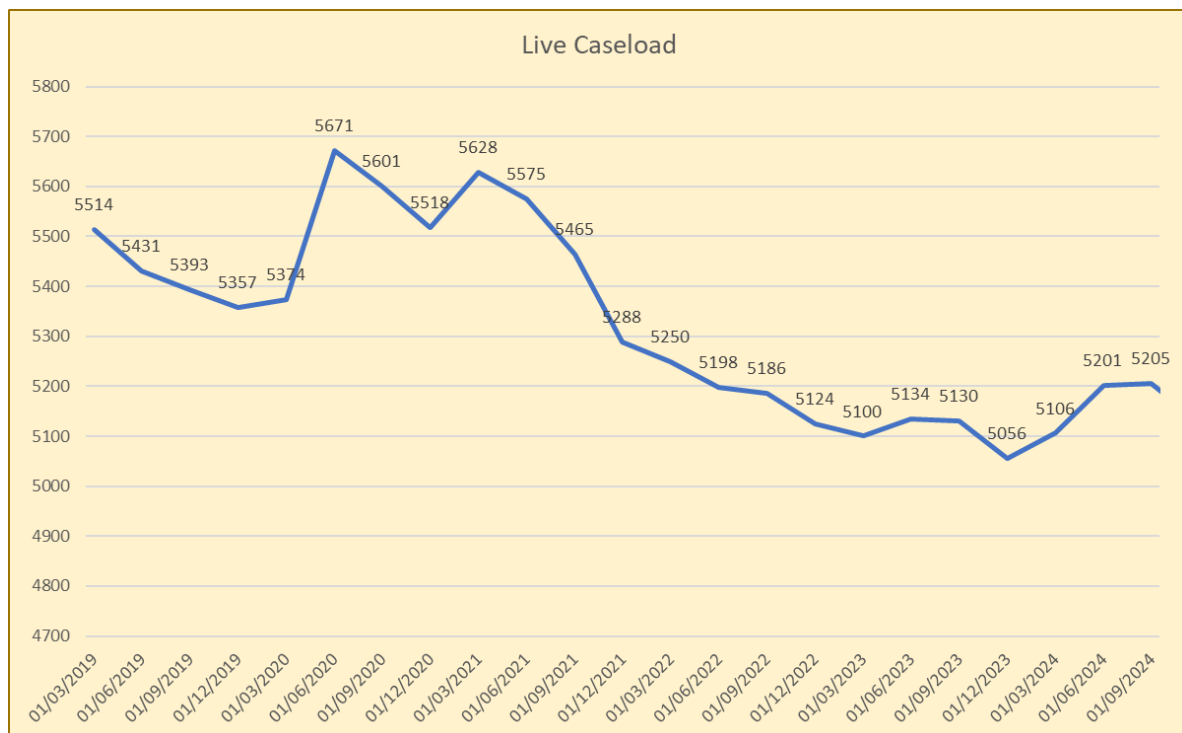


The year to date average time for processing new claims and change of circumstances to the end of December is 10.5 days against a DWP target of 18 days (13.0 for December 2023).

The Council is required by law to operate a Local Council Tax Reduction Scheme (LCTR) to provide financial support to those most in need. LCTR claims are slightly higher than 2023/24 (4,991 claimants as at 31st December 2024 compared to 4,924 at 31st December 2023). This is largely due to the introduction of the banded scheme for 2024/25 approved by [Cabinet on 12 December 2023](#).

The introduction of the scheme has led to a reduction in council tax arrears for those on universal credit from 22.5% at the end of December 2023 subject to enforcement action to 11.1% at the end of December 24.

The total number of people claiming LCTR or housing benefit have increased slightly to 5,128 as at 31st December 2024 compared to 5,056 as at 31st December 2023. After allowing for the LCTR increase due to the introduction of the banded scheme this continues to suggest a flattening out of the general downwards trend aside from the increase in 2021 due to the pandemic.



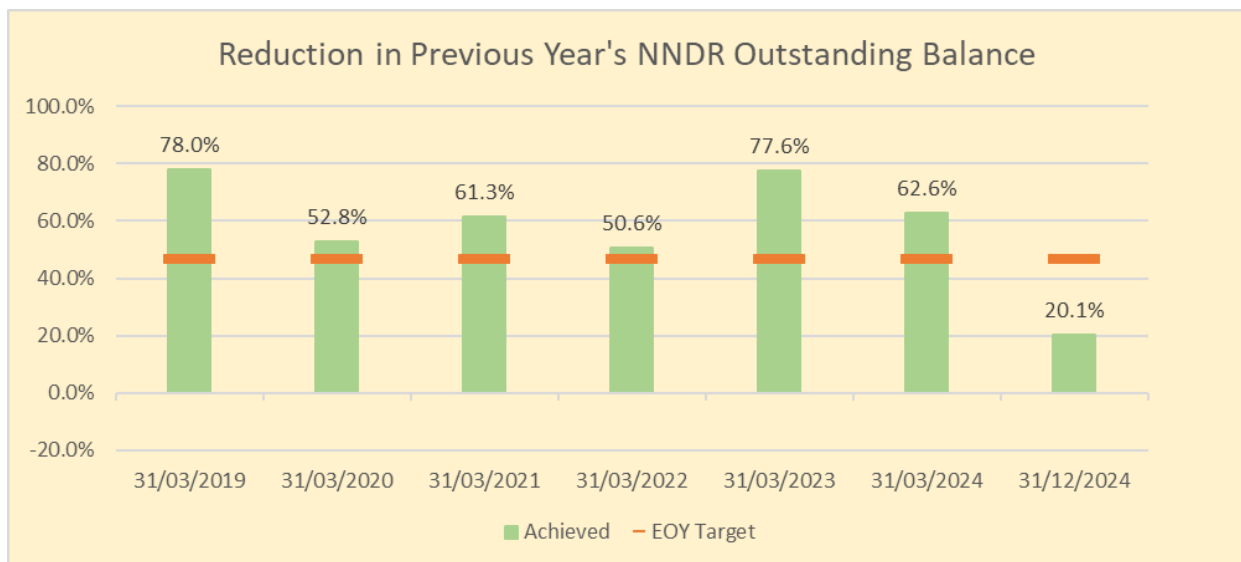
Business Rates (National Non Domestic Rates – NNDR)

Business Rates collection level to 30th December 2024 is 83.8% of the annual total, above target by 0.6% at 31st December (83.0% as at 31st December 2023).

Reminders (595 for 2024/25) are at slightly higher levels to 2023/24 levels (513) with summons also at higher levels than 2023/24. There have been 214 summonses in the first three quarters compared to 205 in the same period for 2023/24. There have been 80 enforcement agent referrals in 2024/25 (76 referrals in 2023/24).

Where the collection of arrears results in court action, the Council aims to recover its court costs. £9,625 were recovered in court costs in the 9 months to the end of December 2024 which is well above the year-to-date target of £3.91k and the end of year target of £6.0k. This can vary depending on the amount of court time available.

The collection of arrears outstanding as 31st December 2024 is currently behind target following a number of valuation amendments resulting in backdated fresh liabilities. It is expected that the Council will be able to collect the increased amounts by the end of the financial year.



Council Tax

Reminders across Q1-2 are at a lower level than 2023/24 (7,818 at 31st December 2024 compared to 9,694 for 2023/24) with liability orders also at lower levels (3,134 summonses compared to 4,168 in 2023/24 with 2,334 liability orders compared to 3,056). Attachment of earnings are also at lower levels (225 attachments compared to 267 in 2023/24) meanwhile there were 1,623 enforcement agent referrals compared to 2,493 in 2023/24.

The Revenues Billing Team backlog has reduced from 519 outstanding items at the end of March 2024 to 98 at the end of December 2024 (15 items at 31st December 2024). This is following significant staff sickness with 2 of the 3 FTE in the Billing Team being absent for operations and has reduced as temporary staff are employed and these staff return to work.

The current year collection level of 86.0% is below the target of 86.4%, this is level with the 2023/24 collection performance. Performance is impacted by the cost of living increases that customers face as well as higher arrears levels leading to reduced current year collection.

Court cost income is well ahead of target by £32k at £172k. The end of year target is £175k, lower than previous years due to anticipated reduced recovery because of the new banded LCTR scheme causing less account adjustments and more bills with zero charge.

Arrears collection in respect of 2023/24 stands at 29.8%, behind the target of 41.8% and the Q3 equivalent last year of 34.0%.

As at 31st December 2024 there were 2,607 live Council Tax universal credit cases. The collection rate for universal credit cases was 69.2% (of a £547k collectable debit) compared to our overall collection rate of 86.0%. The difference shows universal credit collection approximately £92k behind where it would be if it reflected the overall figures.

Direct Debit take up for live universal credit cases is 29.3% compared to 74.2% overall. In addition, 806 reminders have been sent in respect of the 2,607 universal credit cases (7,381 for 35,058 overall liabilities). 11.1% of live universal credit cases have received a summons for non-payment, compared to a figure of 5.5% overall.

Housing

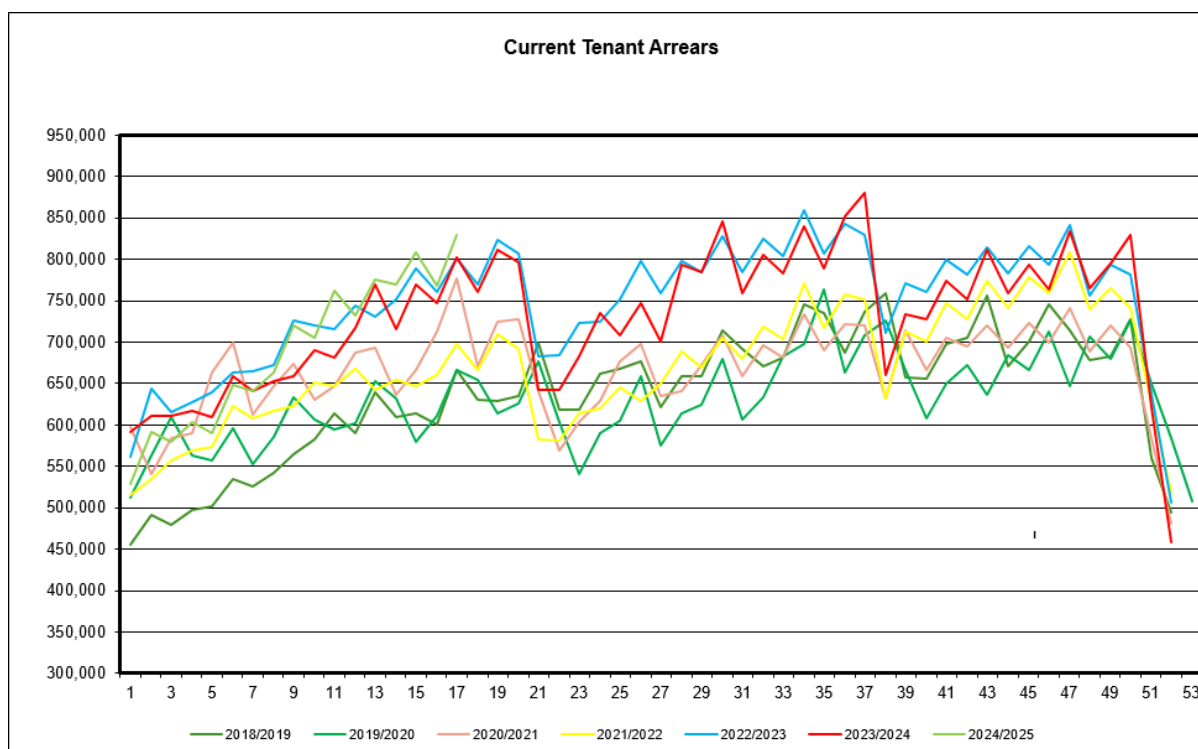
Total **Rent** arrears (excluding former tenants) at 31st December 2024 were £721k compared to £767k at 30th December 2023.

Total arrears (including former tenant arrears, recharges, court costs and garages etc.) are £2.45m at 31st December 2024, compared to £2.06m at 31st March 2024, an increase of £385k (compared to a £406k increase between 31st March 2023 and 31st December 2023).

There has been 4 evictions since 1st April 2024. 70 applications for hardship funding have been received to 31st December 2024 of which 35 have been approved and 3 are ongoing.

Arrears comparison graph year on year performance

The comparison chart below clearly illustrates that whilst arrears generally continue to increase, the general pattern of data across the years arrears remains consistent.



Income Management Arrears Monitoring

Level	Number of Cases	Cases (%)	Arrears Value (£)	% Arrears Value
Clear account	544	12.81%	0.00	N/A
Credit balance	1462	34.42%	-£258,326.93	N/A
Up to £500	1792	42.18%	£303,452.61	38.46%
Between £500-£1000	303	7.13%	£209,490.00	26.55%
Between £1000-£1500	80	1.88%	£95,090.15	12.05%
Between £1500-£2000	35	0.82%	£59,904.30	7.59%
Over £2000	32	0.75%	£121,120.43	15.35%
TOTAL - arrears cases only	2242	52.78%	£789,057.49	
TOTAL - all cases	4248		£530,730.56	

Months in Arrears	Number of Cases	Cases (%)	Arrears Value (£)	% Arrears Value
Less than a month	1732	77.25%	£279,373.60	35.41%
Between 1 and 2 months	341	15.21%	£215,563.81	27.32%
Between 2 and 3 months	94	4.19%	£104,441.49	13.24%
Between 3 and 4 months	37	1.65%	£59,612.30	7.55%
Between 4 and 5 months	14	0.62%	£28,746.39	3.64%
Between 5 and 6 months	13	0.58%	£29,816.16	3.78%
6 months and over	11	0.49%	£71,503.74	9.06%
TOTAL	2242		£789,057.49	

Write Offs

The Assistant Directors and Heads of Service are responsible for the regular review of debts and consider the need for write off and authorise where necessary appropriate write offs in line with the Corporate Credit Policy.

The position for the financial year to date is shown below.

Type	01/04/24 –31/12/24
Council Tax	£23,349.38
Business Rates	£57,936.58
Sundry Income	£11,699.44
Housing Benefit Overpayments	£36,842.82
Housing	£89,166.56

Many of our residents/customers continue to be financially impacted post pandemic and now by the cost of living crisis but it should be noted that at present we would not consider the write off of debts unless we have pursued them to the fullest extent (and as a last resort). In cases where extreme hardship has been identified discretionary housing payments and additional council tax reductions have been made as noted elsewhere in this report, as well as writing off accumulated previous year debt.

The Council is committed to ensuring that debt write offs are kept to a minimum by taking all reasonable steps to collect monies due. There will be situations where the debt recovery process fails to recover some or all of the debt and will need to be considered for write off in accordance with the schemes of delegation prescribed in the Corporate Credit Policy.

The Council views such cases very much as exceptions. Before writing off debt, the Council will satisfy itself that all reasonable steps have been taken to collect it and that no further recovery action is possible or practicable. It will take into account the age, size and types of debt together with any factors that it feels are relevant to the individual case.

Universal Credit

With regard to the roll out of universal credit, the number of universal credit claimants in Tamworth have increased from 8,705 at the end of 2022/23 to 10,160 at 30th December 2024. This is expected to increase further as the roll out of universal credit continues.

Currently, 61.6% of universal credit claimants who are council tenants are behind with their rent, although this does tend to drop at the end of the financial year due to tenants using their rent free weeks to catch up on payments (43.7% at the end of March 24).

The percentage of Council Tax payers on universal credit and in arrears has fallen from 22.5% at the end of December 2023 to 11% at the end of December 2024. This is largely due to the introduction of the Local Council Tax reduction scheme, which demonstrates its success in targeting those least able to pay. More detailed information can be found in the table below.

Indicator	2022/23	Qtr. 1 2023/24	Qtr 2 2023/24	Qtr 3 2023/24	Qtr 4 2023/24	Qtr 1 2024/25	Qtr 2 2024/25	Qtr 3 2024/25
Number of Universal Credit claimants in Tamworth	8,705	8,774	8,998	9,325	9,783	10,137	10,259	10,160
Council Tenants								
Number of Council Tenants on Universal Credit	1,722	1,743	1,776	1,794	1,860	1,962	2,074	2,162
Number of Council Tenants on Universal Credit and in Rent Arrears	779	1,190	1,211	1,184	813	1,352	1,297	1,331
Percentage of Council Tenants on Universal Credit and in Rent Arrears	45.2%	68.3%	68.2%	66.0%	43.7%	68.9%	62.5%	61.6%
Council Tax								
Number of Council Tax Payers on Universal Credit	2,065	2,140	2,194	2,176	2,236	2,403	2,550	2,607
Number of Council Tax Payers on Universal Credit and in arrears with Council Tax payments	396	371	469	489	420	166	264	289
Percentage of Council Tax Payers on Universal Credit and in arrears with Council Tax payments	19.1%	17.3%	21.4%	22.5%	18.8%	6.9%	10.4%	11.1%

3.5 Medium Term Financial Strategy 2024/25 - 2029/30 Monitoring, December 2024

In February Council approved a General Fund revenue budget balanced over 3 years to 2026/27 and a HRA budget balanced over 5 years to 2028/29. The one year local government finance settlement announced by the Secretary of State for Levelling Up, Housing and Communities formed the basis for the MTFs, which assumed an annual increase in council tax of 2.95% and annual housing rent increases capped at CPI + 1%.

There remains a significant amount of uncertainty around Local Government funding in the medium term.

The budget announced in October 2024 by the Chancellor confirmed that the government is committed to reforming the approach to funding allocations within the Local Government Finance Settlement by redistributing funding to ensure that it reflects an up to date assessment of need and local revenues. This has already started with a targeted approach to allocating additional funding in 2025/26, ahead of a broader redistribution of funding through a multi-year settlement from 2026/27.

The Business Rate Reset will see the national redistribution of business rates so that any retained growth (since 2013/14) will be consumed into the national pot for redistribution. When setting the 2024/25 budget, these reforms were expected to be in place from 2026/27, and it has now been confirmed by Government that this indeed will be the case. At this point it is expected that Tamworth will lose significant growth, and it is as yet unknown whether there will be any transitional relief arrangements.

The budget position for the General Fund reported in February 2024 required the use of reserves and balances to fund the projected deficit in 2024/25 to the sum of £1.135m. It was reported that by 2027/28 there would be insufficient balances remaining to finance the increasing deficit and a shortfall of £8.6m was forecast by 2028/29.

Budget forecasts have now been updated to inform the draft budget and MTFs, to be reported to Cabinet on 23rd January and to be considered by Joint Scrutiny (Budgets) on 28th January.

The forecasts for the General Fund include the revised balances brought forward as at the 31st March 2024, the projected outturn for 2024/25, and policy changes submitted to date. They are informed by the provisional Local Government Finance Settlement published in December, which included updated allocations for Revenue Support Grant, New Homes Bonus, the 'Funding Floor' and confirmed our business rates baseline and tariff payable. Government notified us that Tamworth's increase in core spending power is 0%, as for other district and borough councils within Staffordshire, reflecting the redistribution of funding across local government.

Projections have been based on a 2.99% council tax increase, which is the maximum by which it can be increased without triggering a referendum, and detail the updated position as follows:-

Summary	2025/26	2026/27	2027/28	2028/29	2029/30
	£'000	£'000	£'000	£'000	£'000
Estimated Net Cost of Services	10,870	12,896	13,178	13,558	14,044
Proposed Policy Changes / Additional Costs Identified	(963)	373	125	(3)	(116)
Net Expenditure	9,908	13,269	13,303	13,555	13,928
Financing:					
RSG	363	370	378	385	393
Collection Fund Surplus/(Deficit) (Council Tax)	33	33	33	33	33
Collection Fund Surplus/(Deficit) (Business Rates)	(93)	-	-	-	-
Tariff Payable	(11,311)	(12,547)	(12,798)	(13,054)	(13,315)
Non Domestic Ratepayers	14,877	15,175	15,478	15,788	16,104
Council Tax Income	4,926	5,095	5,269	5,449	5,636
Gross Financing	8,795	8,126	8,360	8,601	8,851
Surplus(-)/Deficit	1,113	5,143	4,943	4,954	5,077
Balances Remaining (-) /Overdrawn	(7,473)	(2,330)	2,613	7,567	12,644

For each year, there is a deficit whereby the net cost of services is greater than the financing available, and budgets are being balanced by the use of reserves. This gives us a balanced budget for two years to 2026/27 only, by the end 2027/28 balances are overdrawn by £3.1m, including the minimum required level of balances of £500k (compared to balances of £1.2m as per the February 2024 budget report), with a shortfall of £8.1m by 2028/29 (compared to a shortfall of £8.6m), increasing to £13.1m by the end of the 5 year MTFs period.

In line with the Budget and Medium Term Financial Planning Process 2025/26 report to Cabinet in August, and in recognition of the recommendations contained within the Corporate Peer Challenge report, a number of actions are underway to identify opportunities for savings and additional income to reduce the requirement for the use of GF balances and to put the Council on a more sustainable financial footing. Managers have been tasked to identify 5% - 10% savings from their budgets; and to identify opportunities for spend to save projects utilising the transformation reserve; actions which have already resulted in savings include a zero-based budgeting exercise within Revenues & Benefits; and a further review and challenge to policy changes and the draft capital programme has been undertaken to reduce spend. A detailed Financial Resilience Plan is being developed, with targeted and deliverable savings with clear timescales.

With regard to the HRA, the forecast has been updated to take account of the 2023/24 balances brought forward, the predicted outturn for 2024/25 and policy changes received to date. A rent increase of 2.7%, in line with the Government's rent setting guidance has been assumed and projections are as follows:-

Summary	2025/26	2026/27	2027/28	2028/29	2029/30
	£'000	£'000	£'000	£'000	£'000
Estimated Net (Surplus) / Deficit	(966)	(1,320)	(1,612)	(1,902)	(2,208)
Proposed Policy Changes / Additional Costs Identified	1,630	1,623	1,683	1,721	1,760
Surplus (-) / Deficit	664	303	71	(181)	(448)
Balances Remaining (-) / Overdrawn	(2,666)	(2,363)	(2,292)	(2,473)	(2,921)

Although additional costs are anticipated for the HRA, balances are still in surplus over the five year MTFs period. Projections are for balances of £2.36m by 2026/27 (compared to £6.1m as per the February 2024 budget report) and £2.47m by 2028/29 (compared to £9.6m)., increasing to £2.9m over the 5 year period to 2029/30. However, the inclusion of policy changes for increased costs put additional pressure on the 30 year HRA business plan, which is not sustainable in the longer term, due to the increasing costs of the capital programme, and requires significant cost reduction in future years.

3.6 Treasury Management Update – Period 9 2024/25

Investments held as at 31st December 2024:

Borrower	Deposit £	Rate %	From	To	Notice
NatWest Bank	£5,000,000	5.13%	08-Jul-24	08-Jul-25	-
Birmingham City Council	£5,000,000	5.25%	29-Jul-24	28-Jul-25	-
Slough Council	£5,000,000	5.18%	12-Jul-24	13-Jan-25	-
Lancashire Council	£5,000,000	5.00%	01-Nov-24	01-May-25	-
Gloucester Council	£5,000,000	5.10%	11-Nov-24	12-May-25	-
LB of Newham	£5,000,000	5.27%	15-Jul-24	15-Jan-25	-
Leeds Council	£5,000,000	5.05%	22-Nov-24	22-May-25	-
Gloucester Council	£5,000,000	5.10%	25-Nov-24	27-May-25	-
Telford & Wrekin Council	£5,000,000	5.25%	18-Dec-24	18-Jun-25	-
West Dunbartonshire Council	£5,000,000	5.00%	10-Sep-24	10-Mar-25	-
MMF – Aberdeen	-	4.76%*	-	-	On call
MMF – PSDF	£4,746,000	4.78%*	-	-	On call
MMF – Federated	£9,555,889	4.79%*	-	-	On call
Total	£ 64,301,889	5.06%	-	-	-
Schroders UK Real Estate Fund	£1,848,933	3.64%	-	-	-
Threadneedle Property Unit Trust	£6,056,785	3.56%	-	-	-
Hermes Federated Property Unit Trust	£4,056,500	4.09%	-	-	-
Total	£76,264,107	4.85%	-	-	-

* Interest rate fluctuates daily dependant on the funds investment portfolio, rate quoted is approximate 7 day average.

Fund	Initial Investment	Fund Value 31/12/2024	2024/25 Return to Date		
Schroders UK Real Estate Fund	£1,848,933.03	£1,561,070.37	£44,995.76	3.64%	Returns Received Monthly. Received up to Nov-24.
Threadneedle Property Unit Trust	£6,056,785.32	£5,286,979.53	£108,023.99	3.56%	Returns Received Quarterly. Received up to Sept-24
Hermes Federated Property Unit Trust	£4,056,499.57	£3,518,646.56	£83,203.19	4.09%	Returns Received Quarterly. Received up to Sept-24
Total	£11,962,217.92	£10,366,696.46	£236,222.94	3.75%	

Property Funds

To date, the Council has invested £1.85m with Schroders UK Real Estate Fund, £6.057m with Threadneedle Property Unit Trust, and £4.057m with Hermes Federated Property Unit Trust, total investment £11.962m.

Fund Valuations	Investment	Valuation 31/03/2019	Valuation 31/03/2020	Valuation 31/03/2021	Valuation 31/03/2022	Valuation 31/03/2023	Valuation 31/03/2024	Valuation 31/12/2024
Schroders UK Real Estate Fund	1,848,933	1,897,716	1,884,412	1,848,933	2,139,618	1,727,176	1,567,521	1,561,070
Valuation Increase / (reduction)		48,783	35,479	0	290,685	(412,442)	(281,412)	(287,863)
Threadneedle Property Unit Trust	2,000,249	1,921,884	1,836,032	1,794,439	2,097,097	1,732,373	1,648,601	1,704,623
Valuation Increase / (reduction)		(78,365)	(164,216)	(205,810)	96,848	(364,724)	(351,648)	(295,626)
Threadneedle Property Unit Trust	4,056,536	-	-	-	4,407,163	3,640,676	3,464,625	3,582,357
Valuation Increase / (reduction)					350,627	(766,487)	(591,912)	(474,180)
Hermes Federated Property Unit Trust	4,056,500	-	-	-	4,450,808	3,741,712	3,462,647	3,518,647
Valuation Increase / (reduction)					394,308	(709,096)	(593,853)	(537,853)
Total	11,962,218	3,819,601	3,720,444	3,643,372	13,094,687	10,841,937	10,143,394	10,366,696
Valuation Increase / (reduction)		(29,581)	(128,738)	(205,810)	1,132,469	(1,120,280)	(1,818,824)	(1,595,521)
Annual Revenue % Return		-0.8%	-2.6%	-1.2%	12.5%	-15.8%	-12.3%	-13.3%

The following table details the dividend returns achieved from the property fund investments, which support the revenue budget. The Council received £488k in dividends from its property fund investments in 2023/24 (£458k in 2022/23) and has received £236k for the current financial year as at 31st December 2024. This figure will increase as the Q3 dividends have not yet been received from either Threadneedle or Hermes.

Fund Valuations	Investment	Dividend Returns 31/03/2020	Dividend Returns 31/03/2021	Dividend Returns 31/03/2022	Dividend Returns 31/03/2023	Dividend Returns 31/03/2024	Dividend Returns 31/12/2024
							Q3 Returns not yet received
Schroders UK Real Estate Fund	1,848,933	56,638	52,898	61,655	71,962	72,644	44,996
Threadneedle Property Unit Trust	2,000,249	90,274	75,452	79,231	83,373	92,111	34,829
Threadneedle Property Unit Trust	4,056,536	-	-	70,417	175,213	193,576	73,195
Hermes Federated Property Unit Trust	4,056,500	-	-	57,352	127,182	129,515	83,203
Total		146,911	128,350	268,655	457,730	487,846	236,223
Annual Revenue % Return		3.8%	3.3%	2.2%	3.8%	4.1%	2.6%

External Borrowing as at 31st December 2024:

<u>Borrowing from PWLB</u>				
<u>Loan Number</u>	<u>Rate</u>	<u>Principal</u>	<u>Start</u>	<u>Maturity</u>
475875	8.875%	1,200,000	29/04/1995	25/04/2055
478326	8.000%	1,000,000	17/10/1996	17/10/2056
479541	7.375%	1,000,000	28/05/1997	28/05/2057
479950	6.750%	2,000,000	02/10/1997	03/09/2057
481087	5.625%	3,000,000	22/06/1998	22/06/2058
481641	4.500%	1,400,000	09/10/1998	09/10/2058
483694	4.875%	92,194	21/12/1999	18/10/2059
488835	5.000%	2,000,000	01/07/2004	01/07/2034
490815	4.250%	1,000,000	24/11/2005	24/05/2031
494265	4.430%	2,000,000	21/01/2008	01/01/2037
494742	4.390%	700,000	15/08/2008	15/08/2058
500759	3.520%	5,000,000	28/03/2012	28/03/2053
500758	3.510%	5,000,000	28/03/2012	28/03/2054
500757	3.510%	5,000,000	28/03/2012	28/03/2055
500761	3.510%	5,000,000	28/03/2012	28/03/2056
500755	3.500%	5,000,000	28/03/2012	28/03/2057
500756	3.500%	3,000,000	28/03/2012	28/03/2058
500753	3.500%	1,000,000	28/03/2012	28/03/2059
500760	3.490%	5,000,000	28/03/2012	28/03/2060
500762	3.490%	5,000,000	28/03/2012	28/03/2061
500754	3.480%	5,668,000	28/03/2012	28/03/2062
504499	3.230%	3,000,000	30/11/2015	30/11/2065
Total	4.05%	63,060,194		

Following revisions to the Treasury Management and Prudential Codes in 2021/22, it is now a requirement to report further treasury and prudential indicators to Members on a quarterly basis.

Prudential Indicator for Capital Expenditure

This table below shows the revised estimates for capital expenditure and the changes since the capital programme was agreed at the Budget.

Capital Expenditure	2023/24 Original Programme	Budget B'fwd from 2023/24	Virements in Year	Total 2024/25 Budget	Actual Spend @ Period 9	Predicted Outturn	2024/25 Revised Estimate*
	£m	£m	£m	£m	£m	£m	£m
General Fund	1.868	25.711	-	27.579	11.798	19.974	27.371
HRA	11.043	4.435	-	15.477	6.401	10.872	15.102
Total	12.911	30.146	-	43.057	18.199	30.846	42.474

Limits to Borrowing Activity

The first key control over the treasury activity is a prudential indicator to ensure that over the medium term, net borrowing (borrowings less investments) will only be for a capital purpose. Gross external borrowing should not, except in the short term, exceed the total of CFR in the preceding year plus the estimates of any additional CFR for 2024/25 and the next two financial years. This allows some flexibility for limited early borrowing for future years. The Council has approved a policy for borrowing in advance of need which will be adhered to if this proves prudent.

	2023/24 Outturn £m	2024/25 Original Estimate £m	2024/25 Projected Outturn £m	2024/25 Budget £m
Gross borrowing	63.060	63.060	63.060	63.060
Less investments	66.813	16.292	50.427	50.427
Net borrowing	(3.753)	46.768	12.633	12.633
CFR (year-end position)	74.600	79.190	74.999	79.038

A further prudential indicator controls the overall level of borrowing. This is the **Authorised Limit** which represents the limit beyond which borrowing is prohibited and needs to be set and revised by Members. It reflects the level of borrowing which, while not desired, could be afforded in the short term, but is not sustainable in the longer term. It is the expected maximum borrowing need with some headroom for unexpected movements. This is the statutory limit determined under section 3 (1) of the Local Government Act 2003.

Authorised Limit for External Debt	2024/25 Original Indicator	Current Position	2024/25 Revised Indicator
Borrowing	89.436	89.436	89.436
Total	89.436	89.436	89.436

	2023/24 Outturn £m	2024/25 Capital Programme £m	2024/25 Projected Outturn £m	2024/25 Revised Budget £m
CFR – Non Housing	4.092	7.029	4.492	6.879
CFR – Housing	70.507	72.160	70.507	72.159
Total CFR	74.600	79.190	74.999	79.038
Net movement in CFR	0.325	4.254	0.400	4.438
Operational Boundary				
Expected Borrowing	63.060	63.060	63.060	63.060
Other long term liabilities	-	-		-
Total Debt 31st March	63.060	63.060	63.060	63.060

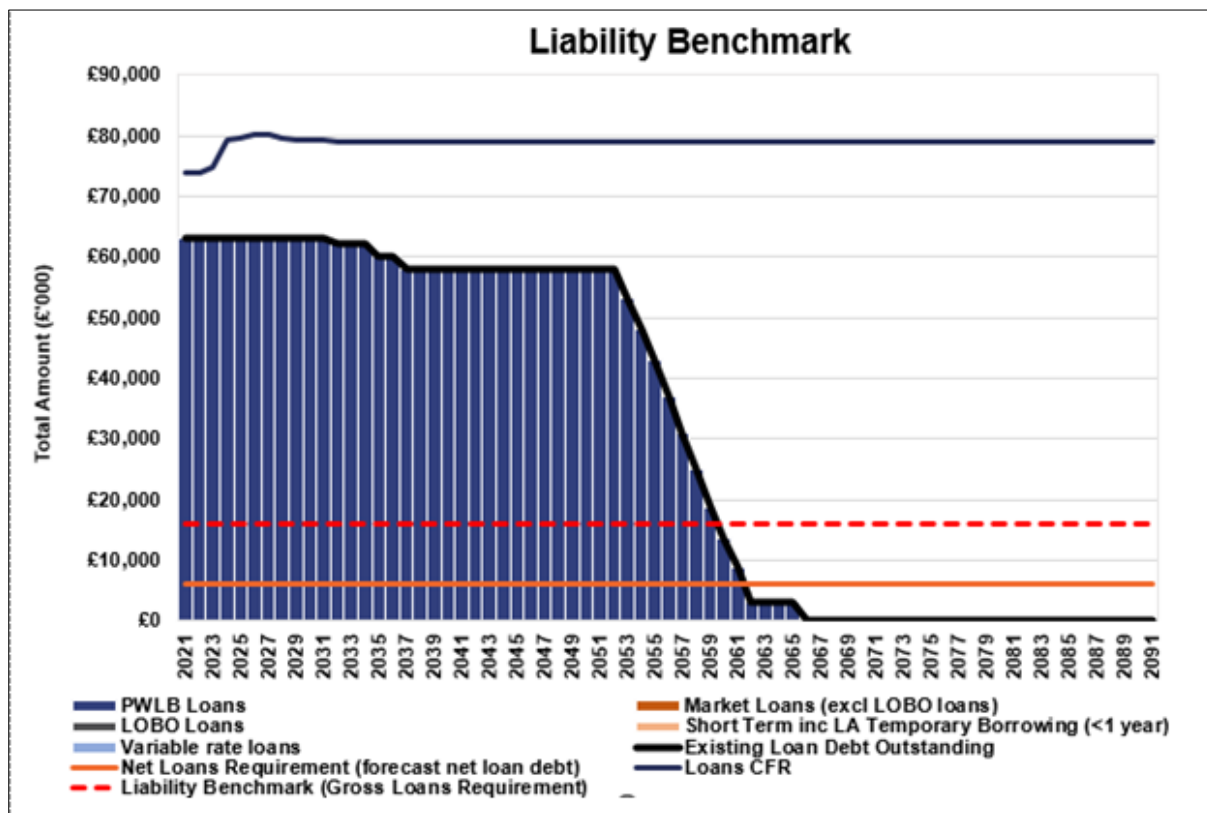
Borrowing

The Council's estimated revised capital financing requirement (CFR) for 2024/25 is £74.999m. The CFR denotes the Council's underlying need to borrow for capital purposes. If the CFR is positive the Council may borrow from the PWLB or the market (external borrowing) or from internal balances on a temporary basis (internal borrowing). The balance of external and internal borrowing is generally driven by market conditions. The table shows the Council has borrowings of £63.060m and plans to utilise £11.939m of cash flow funds in lieu of borrowing. This is a prudent and cost effective approach in the current economic climate but will require ongoing monitoring in the event that upside risk to gilt yields prevails.

It is not anticipated that any additional borrowing will be undertaken during 2024/25

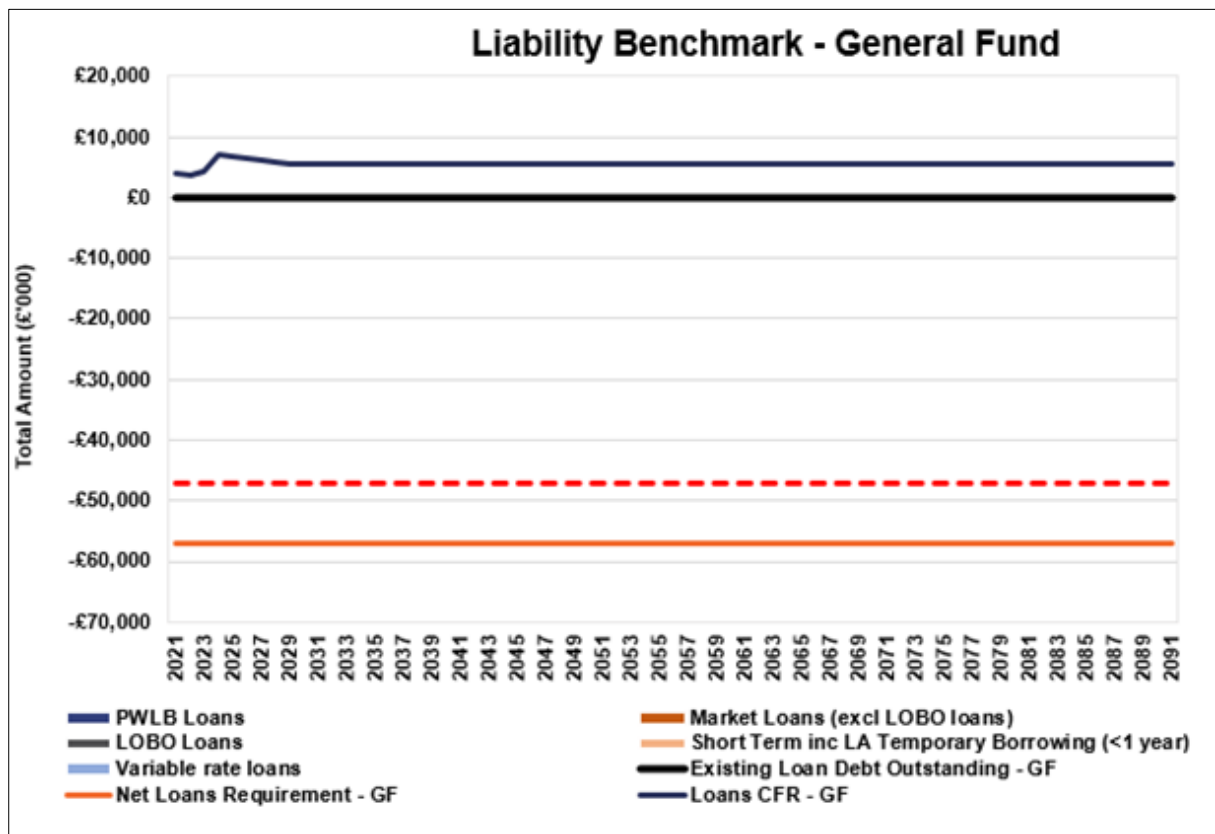
LIABILITY BENCHMARK

CIPFA recommends that the optimum position for external borrowing should be at the level of the Liability Benchmark. This is effectively the Council's net borrowing requirement plus a liquidity allowance. It is calculated by deducting the amount of investable resources available on the balance sheet (reserves, cash flow balances) from the amount of outstanding external debt and then adding the minimum level of investments required to manage day-to-day cash flow.

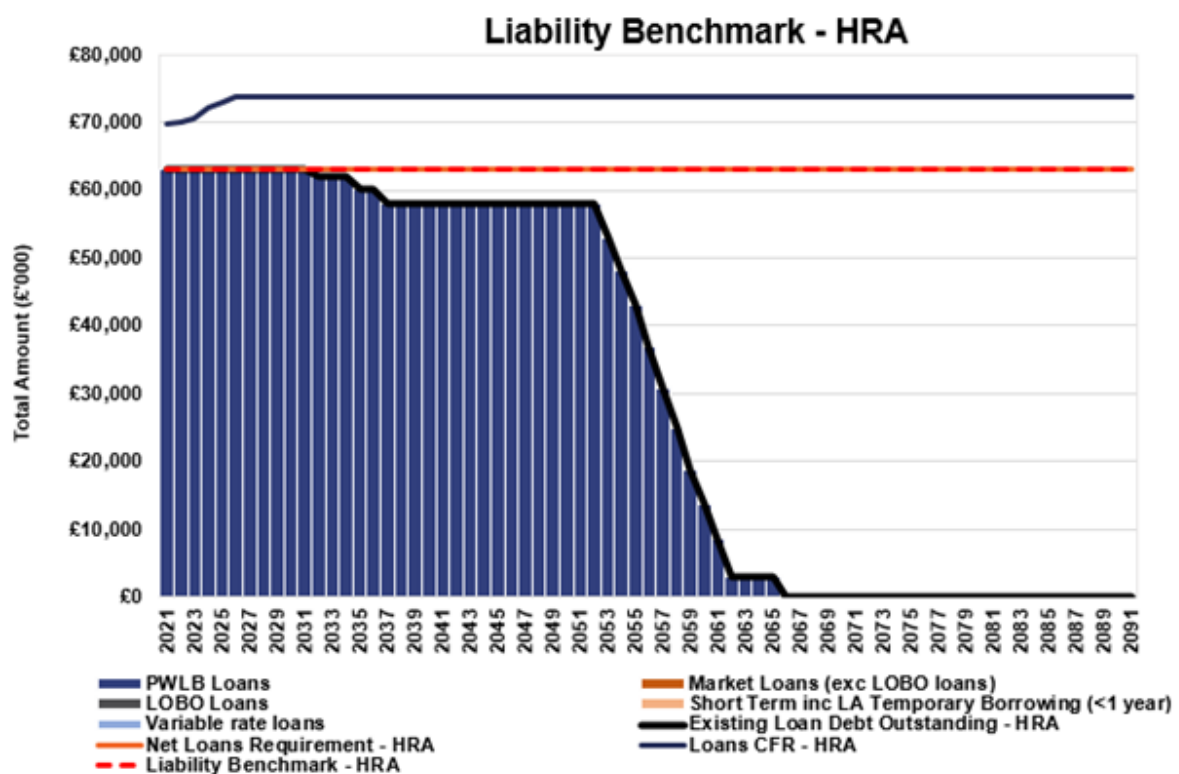


The difference between the loans capital financing requirement and existing debt indicates internal borrowing. Prior to any new borrowing, the Council will have regard to underlying assumptions of liability benchmark analysis as part of prudent treasury management.

The net loans requirement and liability benchmark for the General Fund as shown below is negative as this is reflective of the balance of GF treasury investments held.

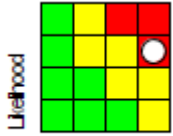

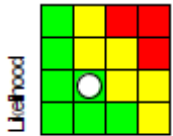

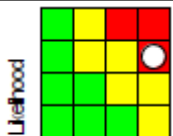

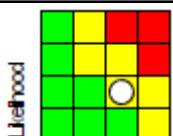

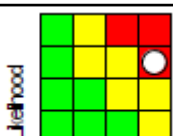



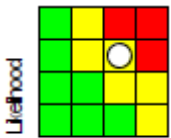

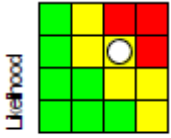

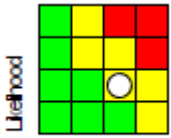

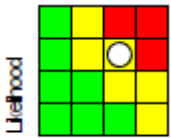

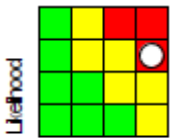

The liability benchmark for the HRA is set at the same level as the net loans requirement (£63m reflecting PWLB loans outstanding) as there is no need to maintain additional borrowing to meet liquidity needs as this falls to the General Fund



4. Corporate Risks


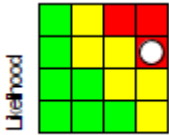
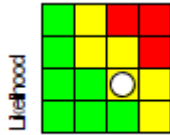
4.1 Corporate Risks Detailed Summary Quarter 3 2024/25

Sub risk	Parent risk	Risk Matrix	Date reviewed	Severity	Likelihood	Rating	Status	Assigned to
CR2024/25_1.1 To ensure that the Council is financially sustainable as an organisation	Finance/Financial stability		13-Dec-2024	4	3	12		Joanne Goodfellow
CR2024/25_2.1 To ensure the Council is fully compliant in all legislative requirements	Governance		09-Jan-2025	2	2	4		Anica Goodwin
CR2024/25_3.1 Failure to understand Borough issues that may lead to community cohesion challenges and community resilience issues affecting Tamworth 'the place'	Promoting community resilience and cohesive communities		17-Dec-2024	4	3	12		Rob Barnes; Hannah Peate; Joanne Sands
CR2024/25_4.1 Failure to deliver a new Local Plan by 2031 and failure to deliver affordable housing.	Inability to meet social housing targets, deliver affordable housing and meet the requirements of the social housing regulations.		06-Jan-2025	3	2	6		Rob Barnes; Anna Miller; Paul Weston
CR2024/25_4.2 Failure to meet the Regulator Social housing consumer standards	Inability to meet social housing targets, deliver affordable housing and meet the requirements of the social housing regulations.		15-Jan-2025	4	3	12		Tina Mustafa

Sub risk	Parent risk	Risk Matrix	Date reviewed	Severity	Likelihood	Rating	Status	Assigned to
CR2024/25_5.1 Failure to provide services or maintain the continued wellbeing and operations within the Borough and be resilient to the unprecedented changes of the future. Lack of resources, capacity and right skills in place to deliver corporate objectives	Organisational Resilience		06-Jan-2025	3	3	9		Rob Barnes; Anica Goodwin
CR2024/25_6.1 Failure to meet climate change ambitions/ meet net zero targets and plan for major weather impacts	Failure to meet climate change/meet net zero targets and plan for major weather impacts		06-Jan-2025	3	3	9		Rob Barnes
CR2024/25_7.1 Effective data management	Information and Data Management		16-Dec-2024	3	2	6		Anica Goodwin
CR2024/25_8.1 Lack of economic growth, sustainability and prosperity in the Borough at the levels required	Inability to deliver economic growth, sustainability and prosperity in the Borough		06-Jan-2025	3	3	9		Rob Barnes; Anna Miller
CR2024/25_9.1 To ensure the council is resilient against Cyber security threats	Cyber Security		09-Jan-2025	4	3	12		Anica Goodwin

4.2 Detailed Corporate Risk Register Summary

1 Finance/Financial stability 2024/25

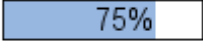
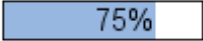

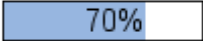
Risk details		Parent Risk	CR2024/25_1 Finance/Financial stability		
Risk Title	To ensure that the Council is financially sustainable as an organisation		Assigned To	Joanne Goodfellow	
Risk Code	CR2024/25_1.1	Corporate priorities	Priority2: The Economy Priority4: Living in Tamworth Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	4	Severity	4	Severity	3
Likelihood	4	Likelihood	3	Likelihood	2
Risk Score	16	Risk Score	12	Risk Score	6
Original Risk Date	15-May-2023	Date Reviewed	13-Dec-2024	Target Date	28-Feb-2025
Causes	<ul style="list-style-type: none"> * Risk of Austerity cuts/Major variances to the level of grant/subsidy * Uncertainty risk and potential financial disruption from External economic influences - mainly on income levels and current cost / inflationary pressures (and contractual cost increases) * Risk potential for poor Procurement practices and weak or ineffective Contract Management meaning VFM not maximised and TBC exposed to unnecessary liabilities. 		Consequences	<ul style="list-style-type: none"> • Inability to plan long term due to uncertainty over future Local Government funding. The new Labour Government has now confirmed that there will be a one year settlement for 2025/26, with some redistribution of funding to Councils with highest deprivation. There will then be a multi-year settlement with a full reset of business rates and funding reform. This means that the Council faces losing significant funding from 2026/27, any tapering or transitional 	

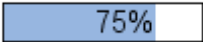
	<ul style="list-style-type: none"> * Ongoing cost of living crisis and inflationary pressures risk having an impact on the Council's income if households struggle to pay council tax, housing rent payments, etc. If families find themselves in financial difficulty it could also increase the demand for our services putting pressure on resources, for example increase in homelessness. * Under utilisation of Assets, failure to maximise income * Major town centre facility/source of income failing * New political leadership and inexperienced members * Not being prepared for the new Procurement Act 2023 * Implications of the national living wage and pay award, plus increased NI thresholds increasing employers' costs * Financial consequences of shared services 		<p>relief is as yet unknown, meaning that the uncertainty continues.</p> <ul style="list-style-type: none"> * Unplanned cost reductions / savings requirements * Financial issues leading to the Authority being taken over by Government appointed officers, having to make a request for additional financial support or issuing a S114 notice with the ensuing reputational damage that would entail. *Inability to plan investments into assets, assets become costly to maintain and deliver little benefit *Inability to diversify/maximise income streams *Social cohesion erosion could occur as public are adversely impacted by cost of living increases – potential for reputational damage for the council if unable to support effectively (or perception). * Procurement challenges which could have reputational and financial implications. Scrutiny from the Government. *Increase in costs from shared services such as Joint Waste, Building Control partnership, Health & Safety. Services shared with other Councils who may also be experiencing financial difficulties or having to increase costs which impacts on TBC. 	
<p>Latest Risk Note</p>	<p>The new Labour Government has confirmed a one year settlement for 2025/26, with some limited redistribution of funding as part of a 'recovery' phase. From 2026/27 there will be a multi-year settlement with long-awaited funding reform, including a full business rates reset. This will mean that the Council faces losing its retained business rate growth as it is redistributed based on needs and deprivation. The scale and likelihood of any transitional relief is as yet unknown which means that the uncertainty continues, making it difficult to plan beyond one year with any certainty.</p> <p>As part of the Local Government Finance settlement for 2024/25, councils were required to produce a productivity plan, to be submitted to DLUHC and published on the website by 19th July. TBC's productivity plan was reported to Corporate Scrutiny and Cabinet in June 2024, and includes details of how the Council will transform services to make better use of resources, identify ways to reduce wasteful spending within systems and take advantage of technological advances.</p>		<p>08 Jan 2025</p>	<p>Emma Dyer</p>

	<p>The report to Corporate Scrutiny and Cabinet also included details of the Financial Stability Plan to support the production of a balanced MTFS and wider organisational improvement, this includes plans to implement targeted zero-based budgeting; budget holder savings reviews; the identification of spend to save projects; and opportunities for service transformation.</p> <p>The Corporate peer challenge report recognised that the Council faces significant financial challenges and stated that addressing this needs to be the Council's immediate and pressing priority. The LGA Peers found that the scale of this challenge is well understood by the senior political and managerial leadership, however they recommended that the Council urgently develops a clear savings plan incorporating tangible, costed and deliverable savings with robust senior management and member oversight. To address this, a Financial Resilience plan with clear workstreams and savings targets is being developed.</p> <p>The ongoing cost of living crisis and inflationary pressures continue to have an impact on the Council's finances. At the same time as rising supply costs there is also the potential for a fall in income as the disposable income of the public reduces due to the pressures on the household purse. This has the potential to affect collection rates for Council Tax and Housing Rents and it is also possible that income to attractions and events will reduce. If families find themselves in financial difficulty it could also increase the demand for our services putting additional pressure on resources, for example increased homelessness, exacerbated by the potential for increased numbers of asylum seekers who may also present as homeless. The situation will continue to be monitored, including through the monthly budget monitoring process.</p> <p>The council will lobby central government and respond to consultations, & LGA surveys when applicable to influence on particular issues in the interest of better local government.</p> <p>Original Risk Score – Impact – 4 Major Likelihood 4 Very Likely. This score was given based on the likelihood of further cuts to government funding; the uncertainty of continuing one year settlement on longer term financial stability; the potential negative impact of business rate funding reform or fairer funding review, whereby funding is likely to be redistributed to unitaries or counties with social care</p>		
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	<p>pressures; and the ongoing impact of the cost of living crisis and potential for a significant reduction in income from commercial property.</p> <p>Current Risk Score – Impact 4 Major Likelihood 3 Likely. Some mitigation in terms of the likelihood of a three year settlement from 2026/27 giving us more certainty over the short to medium term.</p> <p>Target Risk Score – Impact 3 Serious Likelihood 2 Unlikely. In recognition that there is understanding that savings will have to be made over the next three years and that we have a financial stability plan which is being implemented with effect from the 2025/26 MTFS, giving us time to manage the process.</p>		
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RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM1a 2024-25 Annual Fees & Charges Review for 2025/26	<div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;">0%</div>	28-Feb-2025	Annual review of fees & charges as part of budget process	13-Dec-2024	Joanne Goodfellow
RCM1b 2024-25 Financial Stability Strategy & Productivity Plan	<div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center; justify-content: center;"><div style="background-color: #4f81bd; width: 50%;"></div>50%</div>	28-Feb-2025	<p>Financial Resilience Plan in development as part of budget process including planned savings review. EMT meetings (Cabinet and ELT) and all member budget workshops held/planned.</p> <p>Productivity plan completed and emailed to MHCLG Q2.</p> <p>The Financial Resilience plan is currently being drafted, to identify savings targets for inclusion as policy changes where possible with the Final</p>	08-Jan-2025	Joanne Goodfellow

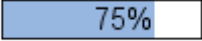
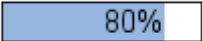
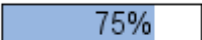
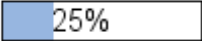
			Budget report to Council in February.		
RCM1c 2024-25 Improvements to procurement processes and contact management in line with new Public Contracts Regulations		31-Mar-2025	Procurement activity reported to CMT on a quarterly basis, CMT briefing from CIPFA on the new Procurement Act attended during quarter 2. Training for staff with regard to the new Procurement Act in progress and report on forward plan to Cabinet to notify of new requirements and gain approval for procurement strategy and plans.	13-Dec-2024	Joanne Goodfellow
RCM1d 2024-25 Monthly Budget Monitoring		28-Feb-2025	Monthly Financial Health check reports to CMT and quarterly to Corporate Scrutiny and Cabinet	13-Dec-2024	Joanne Goodfellow
RCM1e 2024-25 Proactive and targeted cost saving analysis and review of reserve funds		28-Feb-2025	Review of reserves and retained funds reported to Cabinet in December and release of unspent funds to be returned to balances. Review of all vacancies.	13-Dec-2024	Joanne Goodfellow
RCM1f 2024-25 Robust asset management strategy and plans in place		31-Mar-2025	Asset Management Strategy has now been approved. Procurement of external resource underway to carry out high-level Asset Management Planning	30-Dec-2024	Paul Weston

			work. Aim for completion by end of March 2025.		
RCM1g 2024-25 Robust monitoring process for MTFS in place and Quarterly Healthcheck update to Members		31-Mar-2025	2024/25 Quarterly reporting to CMT, Corporate Scrutiny and Cabinet to include review of latest MTFS position.	13-Dec-2024	Joanne Goodfellow

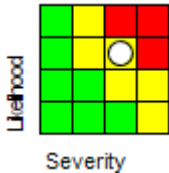
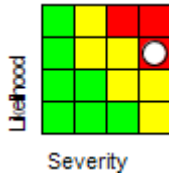
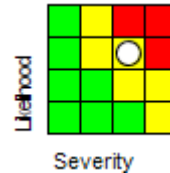
Risk details		Parent Risk	CR2024/25_2 Governance		
Risk Title	To ensure the Council is fully compliant in all legislative requirements		Assigned To	Anica Goodwin	
Risk Code	CR2024/25_2.1	Corporate priorities	Priority2: The Economy Priority1: The Environment Priority3: Infrastructure Priority4: Living in Tamworth Priority: Organisation Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	4	Severity	2	Severity	1
Likelihood	3	Likelihood	2	Likelihood	2
Risk Score	12	Risk Score	4	Risk Score	2
Original Risk Date	09-Sep-2020	Date Reviewed	09-Jan-2025	Target Date	31-Mar-2025
Causes	<ul style="list-style-type: none"> • Failure of democratic process • Failure to understand or respond adequately to new or changing legislation or regulation • No horizon scanning /awareness of legislative changes • Out of date/unclear policies, procedures and documentation 		Consequences	<ul style="list-style-type: none"> • Prosecution of individuals • Adverse impact on Tamworth residents • Increase in costs, Legal and settlement as well as potential rectification of non-compliance • Potential harm to vulnerable persons, employees and commercial relationships 	

	<ul style="list-style-type: none"> • Lack of capacity to meet changing demands and priorities • Not enough capacity to plan ahead proactively due to reactive nature of business activity • Decisions made by Members could impact current planned work • Insufficient direction for strategic priorities – may not be fit for purpose which leads to lack of clarity with planning. • Inadequate training • Poor communication • Insufficient resources (budget constraints/understaffing/inadequate technology • Ineffective leadership • Lack of accountability • Weak risk management • Organisational culture is resistant to change • Lack of clarity of roles and responsibilities 		<ul style="list-style-type: none"> • Legal action • Financial penalties • Reputational damage • Difficulties quantifying what success of objectives/priorities will look like • Impede work that is underway or already planned • Additional effort if required to manage workloads from already stretched services • Unable to effectively priorities objectives and workloads • Potential to mis-align resources • Breach of statutory duties • Disruption of services • Media scrutiny • Employee morale decline • Increase in staff turnover leading to loss of knowledge & experience • Government intervention • Regulatory enforcement • Loss of partnership working • Restricted funding opportunities • Poor inspection / audit ratings • Increased scrutiny
Latest Risk Note	Regular updates to Cabinet members in terms of legislative updates Appointment of new Assistant Director Policy and Performance		09 Jan 2025 Anica Goodwin

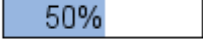


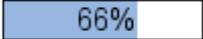
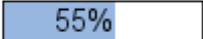
RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM2a 2024-25 Audit and Scrutiny Committees	<div style="width: 75%; background-color: #4f81bd; height: 15px; display: inline-block;"></div> 75%	31-Mar-2025	Regular meetings in place, training provided August 2024.	13-Dec-2024	Joanne Goodfellow

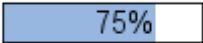
RCM2b 2024-25 Policies and Procedures		31-Mar-2025	AD Policy and Performance commenced 16 December 2024 Project continuing to develop repository of strategies and policies to enable monitoring and prompt managers when updates are due	02-Jan-2025	Zoe Wolicki
RCM2c 2024-25 Governance arrangements		31-Mar-2025	Continue to strengthen the culture of assurance and good governance across the council, including how statutory officer functions work and are distributed across the authority after review of constitution. Review of overview and scrutiny structure.	10-Jan-2025	Anica Goodwin; Nicola Hesketh
RCM2d 2024-25 Comments, Compliments and Complaints		31-Mar-2025	Improved processes for supporting complaint responses Weekly reports of outstanding complaints produced for service managers	16-Dec-2024	Zoe Wolicki
RCM2e 2024-25 Use of insight		31-Mar-2025	New AD Policy and Performance in post December 24 Mechanisms to collect and develop knowledge and insight to be progressed in 2025.	02-Jan-2025	Zoe Wolicki



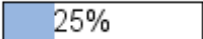
3 Promoting Community Resilience and Cohesive Communities 2024/25

Risk details		Parent Risk	CR2024/25_3 Promoting community resilience and cohesive communities		
Risk Title	Failure to understand Borough issues that may lead to community cohesion challenges and community resilience issues affecting Tamworth ‘the place’		Assigned To	Rob Barnes; Hannah Peate; Joanne Sands	
Risk Code	CR2024/25_3.1	Corporate priorities	Priority1: The Environment Priority4: Living in Tamworth Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	3	Severity	4	Severity	3
Likelihood	3	Likelihood	3	Likelihood	3
Risk Score	9	Risk Score	12	Risk Score	9
Original Risk Date	09-Sep-2021	Date Reviewed	17-Dec-2024	Target Date	31-Mar-2025
Causes	<ul style="list-style-type: none"> . Lack of strong local leadership (political, community etc) . Failure to provide or signpost support for the most vulnerable in our communities . Lack of communication activity/strategy to engage with local communities . Lack of partnership working and initiatives . Failure to understand local issues 		Consequences	<ul style="list-style-type: none"> . May be unable to support the vulnerable leading to wider demands on public services . Wider health and employment inequality . Rise in crime or perception of crime . Increased levels of community tensions . Rise in environmental crime? . Lack of civic pride Lack of aspiration 	

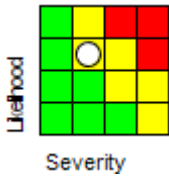
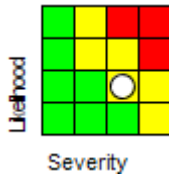
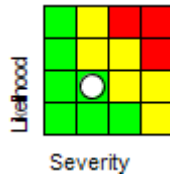
	<ul style="list-style-type: none"> Lack of sustainable approach to community engagement and development which is inclusive and embraces diversity Poor educational outcomes and job opportunities Failure to engage with other statutory agencies 			
Latest Risk Note	Risk remains high, whilst a range of mitigations and projects underway		17 Dec 2024	Hannah Peate

RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM3a 2024-25 Community Wellbeing Strategy		31-Mar-2025	Work will evolve following final outcome of Strategic Outcome Planning Model work to produce a Community Wellbeing Strategy. Item deferred at this time	17-Dec-2024	Hannah Peate; Joanne Sands
RCM3b 2024-25 Commissioning of debt/advice services		31-Oct-2024	Contract in place until March 2027 with citizens advice Mid Mercia. (JS)	15-Oct-2024	Joanne Sands
RCM3d 2024-25 Strong Community Safety Partnership in place		31-Oct-2024	Updated community safety partnerships in place in place as per the launch of the strategic partnership in Sep 2024 (JS)	15-Oct-2024	Joanne Sands
RCM3e 2024-25 Strong partnership working with Staffordshire County Council around strategic community cohesion issues affecting Tamworth communities.		31-Mar-2025	Work with Staffordshire County council on all issues of community safety, community cohesion, early help, health inequalities and asylum dispersal.	17-Dec-2024	Joanne Sands
RCM3f 2024-25 Support for the Voluntary Sector		31-Mar-2025	UKSPF projects commissioned and grants given. Spacehive	17-Dec-2024	Joanne Sands

			Community Crowdfunding platform commissioned.		
RCM3g 2024-25 Wide range of arts, sporting and community events		31-Mar-2025	<p>Fireworks event held in November with an estimated crowd of 18,000 in attendance.</p> <p>Unfortunately due to two storms the Christmas Lights events was unable to take place.</p> <p>Formal opening of the 3G pitch with Hope Powell first full time Lionesses Manager and Rachel Pavlou FA Women's Development Manager, EDI, History & Heritage.</p> <p>Halloween Events and Ghost events hosted at the Castle, along with the Castle by Candlelight and a range of Castle Light up events to mark a range of occasions.</p> <p>Range of shows at The Assembly Rooms including Ballet through to Tribute acts and cinema events.</p> <p>Remembrance Parade Supported.</p>	31-Dec-2024	Hannah Peate


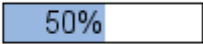

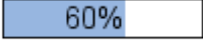
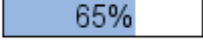

RCM3h 2024-25 Development of a new equality and diversity strategy		31-Dec-2024	Strategy approved by full council on 10 December	02-Jan-2025	Zoe Wolicki
RCM3i 2024-25 Commissioning of Honest Conversations community cohesion project and also Development of spend plan for Community Recovery Fund		31-Mar-2025	Belong commissioned and project work underway. Report expected March 2025. Cabinet update and plan 27 April 2025. Recovery spend outline in planning stage	18-Dec-2024	Hannah Peate; Joanne Sands
RCM3j 2024-25 Development of spend plan for Asylum Dispersal Funding		31-Mar-2025	Grants received - £198,000. 50% community cohesion officer to 31 March 2026. Volunteer coordinator in place CT CIC. Cabinet report in January 2025 - delegation of spend to ED and Sect 151 officer	18-Dec-2024	Joanne Sands

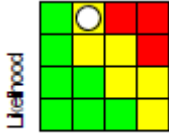
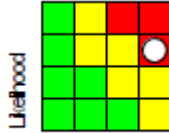
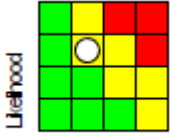
4 Inability to meet social housing targets and deliver affordable housing 2024/25


Risk details		Parent Risk	CR2024/25_4 Inability to meet social housing targets, deliver affordable housing and meet the requirements of the social housing regulations.		
Risk Title	Failure to deliver a new Local Plan by 2031 and failure to deliver affordable housing.		Assigned To	Rob Barnes; Anna Miller; Paul Weston	
Risk Code	CR2024/25_4.1	Corporate priorities	Priority2: The Economy		
			Priority1: The Environment		
			Priority3: Infrastructure		
			Priority4: Living in Tamworth		
			Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	2	Severity	3	Severity	2
Likelihood	3	Likelihood	2	Likelihood	2
Risk Score	6	Risk Score	6	Risk Score	4
Original Risk Date	11-Sep-2024	Date Reviewed	06-Jan-2025	Target Date	31-Mar-2025
Causes	<ul style="list-style-type: none"> Lack of available land Limited finances for investment in affordable housing Lack of effective partnerships with other Social Housing providers 		Consequences	<ul style="list-style-type: none"> Programme slippage Loss of local control over managing change through the planning applications process 	

	<ul style="list-style-type: none"> • Lack of engagement with funders and strategic partners including Homes England • Staff resources within the team • Lack of experience within the team • Inability to procure consultants to collect critical evidence to support the development of the plan • Introduction of new plan-making system by Government • Revisions to National Planning Policy Framework • New administration/political inexperience • Strategies and policies not in line with corporate objectives • Cross-boundary co-operation failure • Lack of engagement from partners • Capacity of PINS and other agencies to deal with demand • Legal Challenge • Insufficient budget • Additional budget is not authorised • Lack of greenfield land for general market housing of which affordable homes provide a component • Delivering affordable homes on brownfield land is challenged by the viability of bringing these sites forwards 		<ul style="list-style-type: none"> • Inability to support other corporate priorities e.g. climate change, adaptation and delivery of affordable housing. • Missed opportunities to work with partners to deliver infrastructure. • Changes to approach lead to challenging policy decision making including using greenbelt land and where to locate housing to meet Tamworth's need • Inability to meet affordable housing needs and targets • Increase in unmet demand 	
<p>Latest Risk Note</p>	<p>Report to January committee on Local Plan project plan.</p> <p>Work progressing well on a communications plan.</p> <p>Housing strategy - Draft strategy produced for comment. Due at Infrastructure Safety & Growth on 29 Jan 2025 and Cabinet on 20 Feb 2025</p> <p>Management of assets, Asset Management Strategy has now been approved. Procurement of external resource underway to carry out high-level Asset Management Planning work. Aim for completion by end of March 2025.</p>		<p>10 Jan 2025</p>	<p>Rob Barnes</p>

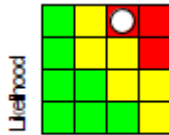
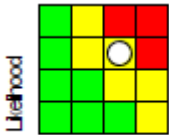
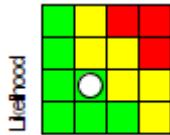
	Work underway to develop council owned garage sites in consultation with homes England.		
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RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM4.1a 2024-25 Preparation of new Local Plan		31-Dec-2026	Report to January committee on Local Plan project plan.	06-Jan-2025	Anna Miller
RCM4.1b 2024-25 Local Plan Communications Plan		31-Mar-2025	Work progressing well on a communications plan.	16-Dec-2024	Anna Miller
RCM4.1c 2024-25 Local Plan Monitoring Report		31-Mar-2025	This is prepared annually (AM)	16-Oct-2024	Anna Miller
RCM4.1d 2024-25 Housing Strategy		31-Mar-2025	Trueman Change have draft strategy produced for comment. Due at IS&G on 29 Jan 2025 and Cabinet on 20 Feb 2025	17-Dec-2024	Joanne Sands
RCM4.1e 2024-25 RCM 2024-25 Management of Assets - deliver Corporate Capital Strategy and Asset Management Strategy actions		31-Mar-2025	Change in progress reflects the fact that whilst the Strategy has been approved there are still local Asset Plans to be produced.	16-Jan-2025	Paul Weston
RCM4.1f 2024-25 Continued coordination with neighbouring authorities to deliver Tamworth's housing need		31-Dec-2026	Discussions with Lichfield District Council regarding housing needs assessment and new settlement. Discussions with South Staffordshire authorities/Birmingham HMA on greenbelt assessment.	20-Jan-2025	Anna Miller

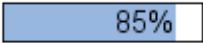
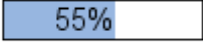
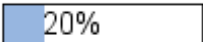
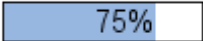
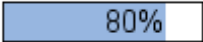
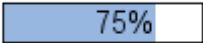
Risk details		Parent Risk	CR2024/25_4 Inability to meet social housing targets, deliver affordable housing and meet the requirements of the social housing regulations.		
Risk Title	Failure to meet the Regulator Social housing consumer standards		Assigned To	Tina Mustafa	
Risk Code	CR2024/25_4.2	Corporate priorities	Priority2: The Economy		
			Priority1: The Environment		
			Priority3: Infrastructure		
			Priority4: Living in Tamworth		
			Priority: Organisation		
			Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	2	Severity	4	Severity	2
Likelihood	4	Likelihood	3	Likelihood	3
Risk Score	8	Risk Score	12	Risk Score	6
Original Risk Date	16-Oct-2024	Date Reviewed	15-Jan-2025	Target Date	31-Mar-2025
Causes	• Capacity to delivery key requirements		Consequences	• Reputational risk • Regulatory intervention by the RSH	
Latest Risk Note	Resourcing of the Social Housing Regulatory Programme remains temporary		15 Jan 2025	Tina Mustafa	

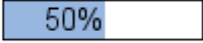
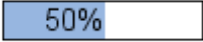

RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM4.2a 2024-25 Social Housing Regulatory Programme		31-Mar-2025	There is a Social Housing Regulatory Programme co-ordinated across the Organisation by AD Neighbourhoods. A performance dashboard with all associated KPIs and Project progress forms part of corporate performance monitoring. Regulatory monitoring is ongoing with the next visit due 28/2/25 led by TMM	15-Jan-2025	Tina Mustafa

5 Organisational Resilience 2024/25

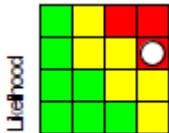


Risk details		Parent Risk	CR2024/25_5 Organisational Resilience		
Risk Title	Failure to provide services or maintain the continued wellbeing and operations within the Borough and be resilient to the unprecedented changes of the future. Lack of resources, capacity and right skills in place to deliver corporate objectives		Assigned To	Rob Barnes; Anica Goodwin	
Risk Code	CR2024/25_5.1	Corporate priorities	Priority2: The Economy Priority4: Living in Tamworth Priority: Organisation		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	3	Severity	3	Severity	2
Likelihood	4	Likelihood	3	Likelihood	2
Risk Score	12	Risk Score	9	Risk Score	4
Original Risk Date	09-Sep-2020	Date Reviewed	06-Jan-2025	Target Date	31-Mar-2025
Causes	* Significant event outside of our control e.g. major disaster, pandemic etc. * Staff not aware of action to be taken in the event of an emergency/disaster * Lack of sufficient agile operational options * Lack of corporate overview to understand and effectively prioritise workloads, resource allocation and understand where cross-function collaboration stands.		Consequences	* Services not delivered * Reduced 'economic attractiveness' * Loss of reputation * Potential to misalign resources * Governance does not provide the full picture * Negative public perception may damage Council's reputation	

	<ul style="list-style-type: none"> * National and local political interference may impede planning and priorities *Executive staff turnover may lead to experience/ knowledge loss *Inability to drive public engagement and manage increase in demand/ expectations *Lack of succession planning *Aging profile of organisation *Lack of incentive for young people to work for council *Competitive salary market impedes finding right candidates including not enough applicants for vacant roles *Increased workloads may not leave enough capacity to complete all in a timely manner *Lack of capacity to respond to changes regulations due to delays in releasing from the Gov and staff already stretched with current workloads. * Failure to have the organisational structure and a skilled and motivated workforce * Ineffective project management and governance * Ineffective performance management 		<ul style="list-style-type: none"> *Difficulties retaining staff – they may look more external opportunities *Costs of turnover and retraining new starters *Potential for noncompliance with specific roles that require accreditation or specific skills *Ability to respond to regulatory/ statutory changes may be inefficient *Working to prioritised work/ leader decisions * Unable to deliver organisational strategies * Increased turnover/absenteeism Service failure leading to ombudsman intervention and increased compensation claims * Decreased staff engagement and satisfaction resulting in poor performance. Impact on health and wellbeing of existing staff 	
<p>Latest Risk Note</p>	<p>Service level BCPs largely complete. Corporate level BCP to follow. Data is being gathered for the corporate level BCP. Aim for completion March 2025.</p> <p>Continued regular meetings with trade union liaison group. Staff AGM held and feedback sought and employee survey underway. Results of which will be shared widely and discussed with trade unions and managers to ensure wellbeing, work environment, employment processes and procedures are all up to date, effective, transparent, fair and equitable. HR policies and procedures continue to be updated and assessed accordingly.</p>		<p>10 Jan 2025</p>	<p>Pardeep Kataria</p>

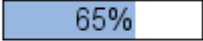

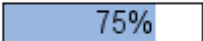
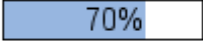


RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM5a 2024-25 Business Continuity Planning	 85%	31-Mar-2025	Service level BCPs largely complete. Corporate level BCP to follow. Data is being gathered for the corporate level BCP. Aim for completion March 2025.	30-Dec-2024	Paul Weston
RCM5b 2024-25 Delivery of People and Organisational Strategy	 55%	31-Mar-2025	Work to update strategy to commence Jan 2025.	02-Jan-2025	Zoe Wolicki
RCM5c 2024-25 Develop Project management skills for key staff	 20%	31-Mar-2025	Review of training needs analysis taking place January 2025 to take into account MTFS pressures	02-Jan-2025	Zoe Wolicki
RCM5d 2024-25 Effective employee relations	 75%	31-Mar-2025	Staff conferences held 3 & 4 December, working group established for to plan for April 2025 conference	06-Jan-2025	Anica Goodwin; Zoe Wolicki
RCM5e 2024-25 Emergency Planning	 80%	31-Mar-2025	in 2024/2025 additional funding was provided for 1 year to increase CCU capacity from 2 days to 4. The Emergency and Business Continuity work planning is reported to CMT and the overall improvement plan is being reviewed for 2025/2026	15-Jan-2025	Tina Mustafa
RCM5f 2024-25 Monitoring of staff turnover	 75%	31-Mar-2025	6 monthly update to appointments and staffing committee on starters, leavers, transfers, secondments etc.	09-Jan-2025	Anica Goodwin; Zoe Wolicki

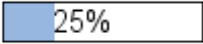


			Staffing turnover reported annually on Pentana		
RCM5g 2024-25 Training plan resourced		31-Mar-2025	<p>Training for some priority areas delivered in Q3 others will be in Q4</p> <p>A review of training needs to take place in Q4 taking into account MTFS pressure and organisational priorities</p>	09-Jan-2025	Zoe Wolicki
RCM5h 2024-25 Workforce plan in place		31-Mar-2025	work continues which will be aligned to CPC, new Corporate plan and factor in MTFS pressures	09-Jan-2025	Zoe Wolicki
RCM5i 2024-25 Personal Development Reviews (Annual Appraisals)		31-Mar-2025	<p>Six month reviews now in progress</p> <p>Non completed PDR's only for seasonal staff, those on maternity leave or long term sickness</p>	02-Jan-2025	Zoe Wolicki

6 Failure to meet climate change ambitions / meet net zero targets and plan for major weather impacts and force majeure 2024/25

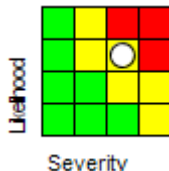
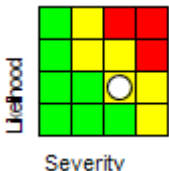
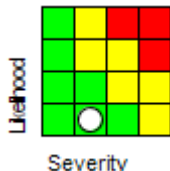
Risk details		Parent Risk	CR2024/25_6 Failure to meet climate change/meet net zero targets and plan for major weather impacts		
Risk Title	Failure to meet climate change ambitions/ meet net zero targets and plan for major weather impacts		Assigned To	Rob Barnes	
Risk Code	CR2024/25_6.1	Corporate priorities	Priority1: The Environment Priority4: Living in Tamworth		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	4	Severity	3	Severity	3
Likelihood	3	Likelihood	3	Likelihood	2
Risk Score	12	Risk Score	9	Risk Score	6
Original Risk Date	19-Aug-2023	Date Reviewed	06-Jan-2025	Target Date	31-Mar-2025
Causes	<ul style="list-style-type: none"> * Staff not aware of action to be taken in the event of an emergency/disaster * Global warming/climate change - severe weather impacts to the Borough * Failure to plan ahead financially for cost implications * Not having the specialist skills in place to develop adverse climate resistant infrastructure * Lack of trained staff to deal with emergencies and over reliance on 3rd parties. * Lack of funding/finance 		Consequences	<ul style="list-style-type: none"> * Life and property put in harms way * Extreme weather conditions/impact on business's & communities * Failure to have a plan for recovery/ repairs/ public support * Impact on vulnerable people Unable to deliver services 	

<p>Latest Risk Note</p>	<p>The Biodiversity Consideration which is part of the Nature Declaration work has been to ISAG and subsequently adopted at Cabinet on the 10th October 2024.</p> <p>Communications plan for climate change for adoption by Cabinet in January 2025.</p> <p>Climate Adaptation Plan reports went to ISAG in December. Sign off from Cabinet in January 2025.</p> <p>Delivery of Riverdrive EV hub , for 8 vehicles, Dec 2024.</p> <p>Climate Change Action Plan awaiting Cabinet approval in January.</p> <p>Flood risks and Risk Control Measure are considered in the Climate Change Action Plan and Climate Change Adaptions Plan.</p> <p>TBC is in the process of writing an internal flood plan to support our response to incidents. Currently any response would use the generic Incident Response Guide (IRG) and the Evacuation and Shelter plan, along with a recently created flooding action card to act as an aide memoire for responding officers. The new flood plan will continue to be supported by these current documents, whilst setting out in further detail TBC actions in preparation for an event, warning and informing, response and recovery after an incident.</p> <p>TBC are working closely with Staffordshire County Council (SCC) to produce a TBC tactical flooding plan. Each local authority (LA) in Staffordshire are completing one and this will be used by SCC to support LAs in the event of a flooding incident. SCC are responsible for some services that could be affected by flooding – highways, schools etc - so to support us, SCC will have a plan with Tamworth Specific details, authorised and verified by TBC.</p> <p>Updates are provided by the CCU Liaison Officer to Directors on Call from the Environmental Agency and MET Officer regarding flood/weather warnings.</p> <p>The Environmental Agency is working with relevant TBC officers to put a Business Case/Plan together to support with our flood control measures and mitigate issues in the future.</p>	<p>17 Jan 2025</p>	<p>Emma Dyer</p>
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RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM6a2024-25 Deliver against the Nature Recovery Declaration	 65%	31-Mar-2025	This work will be ongoing across a number of financial years. The Biodiversity Consideration which is part of the Nature Declaration work has been to ISAG and subsequently adopted at Cabinet on the 10th October 2024.	17-Dec-2024	Hannah Peate
RCM6b 2024-25 Delivery of a communications plan for climate change	 95%	01-Feb-2025	For adoption by Cabinet in January.	16-Dec-2024	Anna Miller
RCM6c 2024-25 Delivery of Climate Adaptation Plan	 75%	01-Feb-2025	Reports went to ISAG in December. Sign off from Cabinet in January.	06-Jan-2025	Anna Miller
RCM6d 2024-25 Delivery of training and induction into climate change	 70%	31-Mar-2025	Work ongoing. To be completed by March 2025.	16-Dec-2024	Anna Miller
RCM6e 2024-25 Development of infrastructure for acting on Climate Change	 100%	31-Mar-2025	Delivery of Riverdrive EV hub , for 8 vehicles, Dec 2024.	16-Dec-2024	Anna Miller
RCM6f 2024-25 Embed climate change into procurement processes	 100%	31-Dec-2024	Climate change has gone into Procurement processes, awaiting committee. (AM)	15-Oct-2024	Anna Miller

RCM6g 2024-25 Embed climate change into the Local Plan review	 25%	31-Dec-2026	Ongoing work with the climate change officer and the Local Plans team.	20-Jan-2025	Anna Miller
RCM6h 2024-25 Severe Weather Emergency Protocol	 100%	31-Mar-2025	The Severe Weather Emergency Protocol is reported as part of Cabinet updated on homelessness. It is a statutory requirement triggered in inclement weather and remains under close review	15-Jan-2025	Tina Mustafa
RCM6i 2024-25 Delivery of Climate Change Action Plan	 95%	01-Feb-2025	Awaiting Cabinet approval in January.	16-Dec-2024	Anna Miller

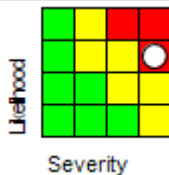
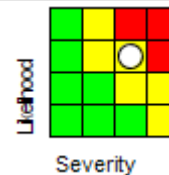
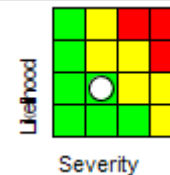
7 Information and Data Management 2024/25

Risk details		Parent Risk	CR2024/25_7 Information and Data Management		
Risk Title	Effective data management		Assigned To	Anica Goodwin	
Risk Code	CR2024/25_7.1	Corporate priorities	Priority2: The Economy		
			Priority1: The Environment		
			Priority3: Infrastructure		
			Priority4: Living in Tamworth		
			Priority: Organisation		
			Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	3	Severity	3	Severity	2
Likelihood	3	Likelihood	2	Likelihood	1
Risk Score	9	Risk Score	6	Risk Score	2
Original Risk Date	19-Aug-2023	Date Reviewed	16-Jan-2025	Target Date	31-Mar-2025
Causes	<ul style="list-style-type: none"> Isolated systems may not support sharing information Lack of joined up systems Non-user-friendly systems may inhibit competency/confidence Unable to keep up with costs of updating systems System obsolescence 		Consequences	<ul style="list-style-type: none"> Lack of insight from information and data systems could impede effective decision making and affect systems viability Missed or gaps in data could impede tracking progress of work and / or lead to inaccurate decisions being made 	


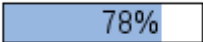
			<ul style="list-style-type: none"> • Not paying for updates to systems could result in vulnerabilities and non-compliance • Potential for cyber-attacks • Reduced operational efficiency (leading to a lack of responsiveness, inability to forecast) • Financial consequences (e.g. missed revenue opportunities) • Regulatory and compliance risks (ie Data breach) • Loss of stakeholder trust • Organisational stagnation (lack of innovation/missed opportunities) • Poor service delivery and impact on reputation • Sanction from regulatory body • Ineffective use of resources 	
Latest Risk Note	<p>The likelihood of this risk remains unchanged, work continues on ensuring data management processes are adhered to, policies have been updated and circulated to all staff via the policy management system for acceptance to mitigate the likelihood of this risk.</p> <p>The impact of this risk also remains unchanged due to the nature of the data held by the council</p>		16 Jan 2025	Anica Goodwin


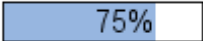
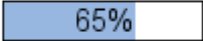
RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM7a 2024-25 Data Protection	<div style="width: 50%; background-color: #4f81bd; height: 15px; border: 1px solid black;"></div> 50%	31-Mar-2025	Line managers continue to monitor completion rates for reviewing and accepting understanding of policies and strategies	02-Jan-2025	Zoe Wolicki
RCM7b 2024-25 Appointment of new policy & performance director	<div style="width: 100%; background-color: #4f81bd; height: 15px; border: 1px solid black;"></div> 100%	31-Dec-2024	Postholder appointed and commenced December 2025	08-Jan-2025	Zoe Wolicki

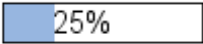
**8 Inability to deliver economic growth, sustainability and prosperity in the Borough
2024/25**

Risk details		Parent Risk	CR2024/25_8 Inability to deliver economic growth, sustainability and prosperity in the Borough		
Risk Title	Lack of economic growth, sustainability and prosperity in the Borough at the levels required		Assigned To	Rob Barnes; Anna Miller	
Risk Code	CR2024/25_8.1	Corporate priorities	Priority2: The Economy		
			Priority1: The Environment		
			Priority3: Infrastructure		
			Priority4: Living in Tamworth		
			Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	4	Severity	3	Severity	2
Likelihood	3	Likelihood	3	Likelihood	2
Risk Score	12	Risk Score	9	Risk Score	4
Original Risk Date	21-Aug-2023	Date Reviewed	06-Jan-2025	Target Date	31-Mar-2025
Causes	<ul style="list-style-type: none"> Lack of investment in the Borough General downturn in the economy due to factors beyond our control Failure to recognise economic changes The uncertainty and financial disruption from External Economic influences and current cost / inflationary pressures (and potential contractual cost increases) 		Consequences	<ul style="list-style-type: none"> Economic prosperity declines Deprivation Reduced Business Rates income Tamworth not seen as a positive place to live or invest in Lack of economic and commercial growth Unable to recruit key/essential skills Failure to deliver project outcomes 	

	<ul style="list-style-type: none"> * Changes in Job market * Inadequate business continuity plans * Lack of economic development strategy * Reliance on small number large income generators/operators/town centre facilities * community cohesion and a negative perception of Tamworth as a place to do business <p>*Uncertainty around the opportunities/risks associated with devolution deal proposals.</p> <ul style="list-style-type: none"> • 		<ul style="list-style-type: none"> * Failure to deliver corporate plan * Government intervention * Increased customer dissatisfaction * Unrealised benefits *Negative public perception may damage Council's reputation
<p>Latest Risk Note</p>	<p>Council has commissioned external consultants to develop a town centre regeneration strategy who commenced their work in December 2024. The strategy will be completed by March 2025.</p> <p>Work has commenced on the developments of an economic development strategy which will be completed in draft by March 2025.</p> <p>Future high streets fund programme progressing well. Changes to the programme in relation to Middle entry due to be considered by full council Jan 2025.</p> <p>Procurement of external resource underway to carry out high-level Asset Management Planning work. Aim for completion by end of March 2025.</p> <p>The Council took ownership of Ankerside Shopping Centre at the end of quarter 3. There are potential risks with this e.g. costs exceeding income, condition of the building, long term sustainability. The Council are working closely with external experts Knight Frank and New River to mitigate against these risks. Further updates will follow in quarter 4.</p>	<p>20 Jan 2025</p>	<p>Emma Dyer</p>

RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM8a 2024-25 3A - Local plan to improve infrastructure , evening economy and transport links		31-Dec-2026	Report to January committee on Local Plan project plan.	06-Jan-2025	Anna Miller
RCM8b 2024-25 Delivery of Future High Streets Fund		31-Dec-2025	<p>Traction on all projects.</p> <p>Discussions around the Middle Entry project continue to determine a way forwards, in terms of logistics and tenant disruption.</p> <p>All other projects are moving forwards. Planning consent has been received for St Editha's square and this project has mobilised. Planning consent has been received for the gateways project - the programming of which has been reevaluated due to the delays with Nationwide finishing of the works to the Peel Cafe.</p> <p>Planning consent has been received for significant enabling works to Market street to make the building water tight and pigeon proof. Work is underway.</p>	16-Dec-2024	Anna Miller

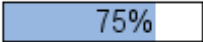
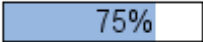
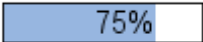
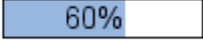

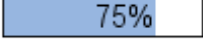
			The TEC is nearing completion, enabling occupation early in the New Year and the Flex building has steels in place with completion May 25.		
RCM8c 2024-25 Delivery of Gungate project (North and South)		31-Mar-2026	Charities commission have agreed to SCC disposing of Gungate North to TBC. Need to press ahead with legals. A couple of issues need resolving around a valuation, vacant possession, and rights of way legal matter. Some initial discussion with new ATIK owners around split of building with Buzz Bingo. # Preparing tenders to support regeneration of Gungate with external legal and programme management specialisms.	16-Dec-2024	Anna Miller
RCM8d 2024-25 Development of business initiatives to promote start up and growth		31-Mar-2025	Looking at new Business Grant - working with portfolio holder on content and purpose.	06-Jan-2025	Anna Miller
RCM8e 2024-25 Management of Assets - deliver Corporate Capital Strategy and Asset Management Strategy actions		31-Mar-2025	Change in progress reflects the fact that whilst the Strategy has been approved there are still local Asset Plans to be produced.	16-Jan-2025	Paul Weston






RCM8f 2024-25 Economic Development Strategy	 25%	31-Mar-2025	A consultants has been appointed. Draft strategy by March 25.	16-Dec-2024	Anna Miller
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Risk details		Parent Risk	CR2024/25_9 Cyber Security		
Risk Title	To ensure the council is resilient against Cyber security threats		Assigned To	Anica Goodwin	
Risk Code	CR2024/25_9.1	Corporate priorities	Priority2: The Economy		
			Priority1: The Environment		
			Priority3: Infrastructure		
			Priority4: Living in Tamworth		
			Priority: Organisation		
			Priority5: Town Centre		
Original Risk Matrix		Current Risk Matrix		Target Risk Matrix	
Severity	4	Severity	4	Severity	4
Likelihood	3	Likelihood	3	Likelihood	2
Risk Score	12	Risk Score	12	Risk Score	8
Original Risk Date	10-Oct-2024	Date Reviewed	09-Jan-2025	Target Date	10-Oct-2025
Causes	<ul style="list-style-type: none"> • Network compromise/external attack • Denial of service • Data Leaks • Credential compromise • Cloud supplier compromised • Malware/phishing attack 		Consequences	<ul style="list-style-type: none"> • Loss of sensitive data, financial loss, reputational damage. • Risk to confidentiality and integrity of data (data breach). • Data encryption/corruption causing operational disruption. • Unauthorized access to data. 	

	<ul style="list-style-type: none"> • Lost device/mobile media • Insider Threat (staff) 		<ul style="list-style-type: none"> • Service downtime. • Personal harm.
Latest Risk Note	<p>This risk remains high given the frequency of cyber-attacks and the continuing threat globally.</p> <p>The impact also remains high given the reliance on technology and information to provide council services.</p> <p>The risk control measures are constantly under review to reflect the national and international context.</p>	09 Jan 2025	Zoe Wolicki

RCM Mitigating action	Progress	Due date	Latest note	Latest note date	Assigned to
RCM9a 2024-25 Regular, mandatory cyber security training and cyber security awareness updates to Infozone	<div style="width: 75%;"><div style="background-color: #4f81bd; color: white; padding: 2px;">75%</div></div>	31-Mar-2025	<p>Bi monthly cyber update to all staff in employee newsletter, including latest news and threats</p> <p>Mandatory cyber security training updated and requirement increased to annual completion</p>	03-Jan-2025	Zoe Wolicki
RCM9b 2024-25 Network penetration testing, proactive vulnerability management policy and processes and Phishing tests. PSN Compliance	<div style="width: 75%;"><div style="background-color: #4f81bd; color: white; padding: 2px;">75%</div></div>	31-Mar-2025	<p>continued to proactively scan on a monthly basis and associated remediation work</p> <p>no significant issues identified</p>	03-Jan-2025	Zoe Wolicki
RCM9c 2024-25 Network backups, disaster recovery testing	<div style="width: 75%;"><div style="background-color: #4f81bd; color: white; padding: 2px;">75%</div></div>	31-Mar-2025	<p>Network backups performed nightly including integrity test</p>	03-Jan-2025	Zoe Wolicki

			Selective backup recovery testing performed monthly		
RCM9d 2024-25 Strong password policy with multi factor authentication enforced where necessary		31-Mar-2025	MFA enforced for all remote connections	03-Jan-2025	Zoe Wolicki
RCM9e 2024-25 Anti-virus/anti-malware software in place with regular signature updates		31-Mar-2025	AV/anti-malware installed on all endpoints, updates applied immediately as available	03-Jan-2025	Zoe Wolicki
RCM9f 2024-25 Appropriate access controls with least privilege approach, regular access reviews		31-Mar-2025	Access controls for applications and data in place based on least privilege, system administrators in service areas review access to applications	03-Jan-2025	Zoe Wolicki
RCM9g 2024-25 Utilise NCSC Active Cyber Defence tools		31-Mar-2025	Cyber Assessment Framework - Successfully met all requirements of the "Get CAF ready Programme", now eligible for £15,000 grant. Full assessment to take place in 2025	16-Dec-2024	Zoe Wolicki
RCM9h 2024-25 Information security policies, distributed to all staff and DR/BC/cyber incident response plans in place		31-Dec-2024	policies now included in central policy/ strategy database.	02-Jan-2025	Zoe Wolicki
RCM9i 2024-25 Physical security controls in place for data centre access		31-Mar-2025	Restricted access in place for data centre to ICT technical staff only	03-Jan-2025	Zoe Wolicki

Risk Status	
	Alert
	High Risk
	Warning
	OK
	Unknown

Risk Control Measure Status	
	Cancelled
	Overdue; Neglected
	Unassigned; Check Progress
	Not Started; In Progress; Assigned
	On track and in control
	Completed

5. Audit Plan update – End of Quarter 3

The internal audit plan for 2024/25 approved by the Audit & Governance Committee at its meeting in March 2024. The plan was for a total of 17 audits.

To the end of quarter 3 2024/2025 we have completed 35% of the audit plan. We have fully completed all of the audits rolled forward from 2023/24.

An analysis of audit plan completion and indicatively planned audits is shown in the table below;

	Q1	Q2	Q3	Q4
Number of audits allocated per quarter	4	4	5	3
% of plan	25	25	31	19
Cumulative 2024/25 audit plan % completed	12	18	35	
Completed and finalised 2023/24 audits	3	3	5	
Audits drafted and awaiting management agreement 2024/25	1	0	2	

The total outstanding actions at the end of Quarter 3 are 34 (6 high, 21 medium, 7 low).

During 2024/25 the audit manager will hold quarterly meetings with all assistant directors to review all outstanding recommendations, and additional report will be provided to audit & governance committee providing greater detail for committee scrutiny.

Priority of Recs	High	Medium	Low	Total
Number of O/S recs – 1 April 2024	9	26	12	47
Number of recs closed during period Apr – Dec 2024	6	26	20	52
Number of additional recs made during Apr- Dec 2024	3	21	15	39
Number of O/S recs at 31 Dec 2024	6	21	7	34

As at 31 December 2024 there were 6 high priority recommendations of which 5 were overdue.

6. Information Governance Reports

The Information Governance Team is responsible for investigating and providing responses on behalf of the organisation for a number of statutory requirements.

6.1 Personal Data Breaches

Part 3 of the DPA 2018 introduces a duty on the Council to report certain types of personal data breaches to the Information Commissioner (ICO). The Council must do this within **72 hours** of becoming aware of the breach, where feasible.

A personal data breach means a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data. This means that a breach is more than just losing personal data.

The Council only has to notify the ICO of a breach if it is *likely to result in a risk to the rights and freedoms of individuals*.

The table below provides a summary of statistics for Quarter 3 2024.

01 October 2024 – 31 st December 2024 Number of personal data breaches recorded	4
01 October 2023 – 31 st December 2023 Number of personal data breaches recorded	4
Increase / decrease of % compared to same time last year	0% increase / decrease
Highest amount received Quarter 3 2024	November – 2
Lowest amount received Quarter 3 2024.	October/December - 1
Total breaches reported to the Information Commissioner (ICO)	0
Number of breaches successfully reported to the ICO within the statutory timeframe of 72 hours	0
Breach Category	N/a
ICO Findings	N/a

6.2 Freedom of information (FOI) and Environmental Information Regulations (EIR) requests

The Freedom of Information Act 2000 provides public access to information held by public authorities, and this is done in two ways:

- publishing certain information about the Council activities; and
- where members of the public are entitled to request information from the Council.

Recorded information includes printed documents, computer files, letters, emails, photographs, and sound or video recordings.

The table below provides a summary of statistics for Quarter 3 2024.

01 October 2024 – 31 st December 2024 – total requests received	132
01 October 2023 – 31 st December 2023 - total requests received	137
Decrease of % compared to same period last year	3.64%
Highest monthly requests received	51 – October 24
Lowest monthly requests received	38 – August 24
Responded to within statutory requirement of 20 working days	130
Percentage responded to within statutory requirement of 20 working days	98.48%

High Demand Service Areas

Service Areas for FOI/EIR requests the last 3 months.

Partnerships	23
Env Health/Revenue/Housing	17
Transfer to SCC	16

Request Trends

Top 3 topics for FOI/EIR requests in quarter 3 were:

Temporary Accommodation
Bio Diversity Net Gain / Climate
Vehicular PCNs / Car Parks

Internal reviews

Under FOI/EIR, the requester has the right to appeal about the way their request has been handled. This is known as an Internal Review.

The table below provides a summary of statistics for Quarter 3 2024

01 st October 2024 – 31 st December 2024– Number of Internal review requests received	1
01 st October 2023 – 30 st December 2023- Number of Internal review requests received	2
Increase or decrease of % compared to same period last year	50% decrease
Responded to within statutory requirement of 20 working days	1
Percentage responded to within statutory requirement of 20 working days	100%

Information Commissioner

If, following an internal review, a requestor remains dissatisfied with the response they can approach the Information Commissioners Office (ICO) to ask them to review the decision.

The table below provides a summary of statistics for Quarter 3 2024

01 st October 2024 – 31 st December 2024 – Number of Enquiries received by ICO	0
01 st October 2023 – 31 st December 2023 - Number of Enquiries received by ICO	1
01 st October 2024 – 31 st December 2024 – ICO Findings	N/a

6.3 Subject Access Requests

Under Data Protection legislation (DP), primarily the UK General Data Protection Regulation (UK-GDPR) and the Data Protection Act 2018 (DPA 2018), individuals have rights in relation to the information the Council holds about them. This includes the right to be provided with a copy of the information the Council holds about them, a 'subject access request' (SAR).

SAR requests are facilitated centrally through Council's Information Governance Team (IGT). They triaged and allocated to individual services for review and response. The IGT review and issue responses, in addition, supporting service areas with any relevant exemptions/exceptions that may apply.

SAR's requests must be answered within one calendar month from the date the request was received.

The table below provides a summary of statistics for Quarter 3 2024.

01 st October 2024 – 31 st December 2024 – total requests received	5
01 st October 2023 – 31 th September 2023 - total requests received	9
Increase / decrease of % compared to same time last year	44.44% decrease
highest amount received Quarter 3 2024	November – 3
lowest amount received Quarter 3 2024	December - 2
Responded to within statutory timeframe of one calendar month	5
Responded to within statutory timeframe of one calendar month %	100%

If a requestor is dissatisfied with the response under, they can approach the Information Commissioners Office (ICO) to ask them to review the decision.

The table below provides a summary of statistics for Quarter 3 2024

01 st October 2024 – 31 st December 2024 – Number of Enquiries received by ICO	0
01 st October 2023 – 31 st December 2023 - Number of Enquiries received by ICO	0
01 st October 2024 – 31 st December 2024 – ICO Findings	N/a

6.4 Comments, Compliments and Complaints

This update provides a summary of the councils' quarter three performance in handling complaints effectively, resolving complaints in a timely manner and identifying areas for improvement when our service is found to be below expectation.

The update covers the period from **1 October - 31 December 2024**

To comply with the housing ombudsman complaint code and enhance TSM performance reporting, complaints relating to housing as a social landlord will be reported separately within this document. This separation enables a more focused approach to monitoring and improving the handling of housing-related complaints.

Housing Complaints

During this period, the council received a total of 50 complaints. This includes:

- 44 at Stage 1
- 6 at Stage 2

Stage 1 complaints

Of the 44 Stage 1 complaints processed:

- 11 (25%) were responded to within the statutory timeframe of 10 working days.
- 18 were responded to beyond the statutory timeframe
 - 1 Tenancy Management
 - 1 Housing Solutions.
 - 16 Housing Repairs
- 15 complaints related to housing repairs were not addressed. Measures have been implemented to ensure that all outstanding complaints are thoroughly investigated and resolved
- 13 complaints were upheld of which:
 - 5 due to delayed responses
 - 5 due to incomplete repairs
 - 3 were awarded compensation

2024/2025	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints (Stage 1)					
No. of complaints received	119	27	48	44	
No. per 1,000 housing stock (%)	17.45%	6.28	11.18%	10.25%	
Responded to within the Housing Ombudsman Complaint Handling timescales (10 Working days)	37	13	13	11	
Responded to within the Housing Ombudsman Complaint Handling timescales (%)	31%	48%	27.08%	25.00%	

Stage 2 complaints

Of the 6 stage 2 complaint processed:

- 3 (50%) were responded to within the statutory timeframe of 10 working days
- 2 was responded to beyond the statutory timeframe
 - Housing repairs
 - Housing Solutions (The response time for this complaint was extended due to the complexities of the case)
- 1 complaint related to housing repairs was not addressed. Measures have been implemented to ensure that all outstanding complaints are thoroughly investigated and resolved.
- 1 complaint was upheld due to incomplete works

2024/2025	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints (Stage 2)					
No. of complaints received	15	8	1	6	
No. per 1,000 housing stock (%)	2.09%	1.86%	0.23%	1.40%	
Responded to within the Hosuing Ombudsman Complaint Handling timescales	6	2	1	3	
Responded to within the Housing Ombudsman Complaint Handling timescales (%)	40%	25%	100%	50.00%	
Overall total of complaints received	134	35	49	50	0

Overall, this results in a rolling yearly average of 31.09% for stage 1 and 40% for stage 2.

All 50 complaints received in quarter 3 were acknowledged within 5 working days, equating to 100% compliance with the statutory timeframe for acknowledgments.

	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints Ack (within Housing Ombudsman Timeframe)	129	35	44	50	
Complaints Ack (within Housing Ombudsman Timeframe (%))	94.05%	100.00%	89.80%	100.00%	

This provides a rolling yearly average of 96.27% of complaints being acknowledged within statutory timeframe.

Housing (other enquiries)

In addition to handling complaints, the team processed:

- 63 service requests/updates, general enquiries
- 55 member enquiries
- 11 compliments

Overall, the Information Governance team processed 129 contacts for Housing in quarter 3, with a summary of the data shown below.

Stage 1 complaints:

Breakdown of Data (Service Area) Qtr 3 Complaints Stage 1	Number of Stage 1 complaints received	No. per 1,000 housing stock (%)	Responded to within the Housing Ombudsman Complaint Handling timescales (10 Working days)	Responded to within the Housing Ombudsman Complaint Handling timescales (%)
ASB	2	0.47%	1	50.00%
Housing Repairs	30	6.99%	2	6.67%
Housing Repairs Gas				
Housing Repairs Planned				
Housing Solutions	6	1.40%	5	83.33%
Rental Income				
Sheltered Housing				
Tenancy Management	6	1.40%	3	50.00%
Tenancy Involvement Group				
Wardens				
Total	44	10.25%	11	25.00%

Stage 2 complaints

Breakdown of Data (Service Area) Qtr 3 Complaints Stage 2	Number of Stage 2 complaints received	No. per 1,000 housing stock (%)	Responded to within the Housing Ombudsman Complaint Handling timescales (20 Working days)	Responded to within the Housing Ombudsman Complaint Handling timescales (%)
ASB				
Housing Repairs	3	0.70%	1	33.33%
Housing Repairs Gas				
Housing Repairs Planned				
Housing Solutions	2	0.47%	1	50.00%
Rental Income				
Sheltered Housing				
Tenancy Management	1	0.23%	1	100.00%
Tenancy Involvement Group				
Wardens				
Total	6	1.40%	3	50.00%

Other enquiries

Breakdown of Data (Service Area) Qtr 3	Total Service Requests/Service request updates / General Enquiries	Total Compliments	Member Enquiries
ASB	15		1
Housing Repairs	19	2	26
Housing Repairs Gas			1
Housing Repairs Planned	1		1
Housing Solutions	2	1	16
Rental Income			
Sheltered Housing	1	1	
Tenancy Management	25	7	10
Tenancy Involvement Group			
Wardens			
Total	63	11	55

Stage 1 complaints have experienced a slight decrease this quarter, with housing repairs comprising 30 of the 44 complaints recorded. In contrast, Stage 2 complaints have seen an increase with 3 of the 6 complaints received relating to housing repairs.

No clear pattern exists for the rise in stage 2 complaints. The data indicates that the stage 2 complaints stem from past complaints with outstanding actions not completed. The team have improved internal processes, implemented a compensation policy and strengthened relationships with the councils' contractors, working to enhancing customer satisfaction.

The council acknowledges that response times require enhancement. To address this, the council continues to review and refine internal processes, bolstering communication, and promoting collaboration with various departments, contractors, and the Information Governance team. These measures aim to improve the customer experience and comply with housing ombudsman requirements.

Corporate Complaints

During this period, the council received a total of 12 complaints. This includes:

- 12 at Stage 1
- 0 at Stage 2

Stage 1 complaints:

Of the 12 Stage 1 complaints processed:

- 4 (33.33%) were responded to within the Local Government and Social Care Ombudsman (LGSCO) guidance of 10 working days
- 2 were responded to beyond the LGSCO guidance
 - Land Charges
 - Assembly Rooms
- 6 complaints relating to Car Parks, Multi Departments, were not addressed. Measures have been implemented to ensure that all outstanding complaints are thoroughly investigated and resolved.
- 1 complaint was upheld due to lack of communication.

2024/2025	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints (Stage 1)					
No. of complaints received	43	11	20	12	
Responded to within policy and LGSC Complaint Handling Code guidance (10 Working days)	21	7	10	4	
Responded to within policy and LGSC Complaint Handling Code guidance (%)	49%	64%	50%	33.33%	

Stage 2 complaints

There were 0 Stage 2 complaints received for this quarter.

2024/2025	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints (Stage 2)					
No. of complaints received	2	1	1	0	
Responded to within policy and LGSC Complaint Handling Code guidance (20 Working days)	2	1	1	0	
Responded to within policy and LGSC Complaint Handling Code guidance (%)	100%	100%	100%	N/A	

Overall, this results in a rolling yearly average of 48.84% for stage 1 and 100% for stage 2.

2024/2025	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints (Stage 1)					
No. of complaints received	43	11	20	12	
Responded to within policy and LGSC Complaint Handling Code guidance (10 Working days)	21	7	10	4	
Responded to within policy and LGSC Complaint Handling Code guidance (%)	48.84%	64%	50%	33.33%	
Responded to within policy and LGSC Complaint Handling Code guidance (where complex) (20 Working days)					
Responded to within policy and LGSC Complaint Handling Code guidance (where complex) (%)					
2024/2025	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints (Stage 2)					
No. of complaints received	2	1	1	0	
Responded to within policy and LGSC Complaint Handling Code guidance (20 Working days)	2	1	1	0	
Responded to within policy and LGSC Complaint Handling Code guidance (%)	100%	100%	100%	N/A	
Responded to within policy and LGSC Complaint Handling Code guidance (where complex) (40 Working days)					
Responded to within policy and LGSC Complaint Handling Code guidance (where complex) (%)					
Overall total of complaints received	45	12	21	12	

All 12 complaints received in quarter 3 were acknowledged within 5 working days, equating to 100% within policy and LGSC guidance for acknowledgments.

	Year Total	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Complaints Ack within policy and LGSC Complaint Handling Code guidance	43	11	20	12	
Complaints Ack within policy and LGSC Complaint Handling Code guidance (%)	96.88%	100.00%	95.24%	100.00%	

This provides a rolling yearly average of 96.88% of complaints being acknowledged within policy and LGSC guidance for acknowledgments

Corporate (other enquiries)

In addition to handling complaints, the team processed:

- 126 service requests/updates, general enquiries
- 110 member enquiries
- 14 compliments

Overall, the Information Governance team processed 250 contacts for Corporate Services for quarter 3, with a summary of the data shown below.

Stage 1 complaints:

Breakdown of Data (Service Area) Qtr 2 Complaints Stage 1	Number of Stage 1 complaints received	Responded to within policy and LGSC Complaint Handling Code guidance (10 Working days)	Responded to within policy and LGSC Complaint Handling Code guidance (%)
Benefits			
Car Parks	4	0	0.00%
Castle			
CCTV			
Commercial Assets			
Council Tax & Revenues	1	1	100.00%
Customer Services			
Democratic Services			
Elections			
Environmental Health			
Joint Waste			
Land Charges / Legal (Right to Buy)	1	0	0.00%
Multiple Depts	3	0	
Partnerships			
Planning & Development			
Private Sector			
Street Scene	1	1	100.00%
Assembly Rooms	1	1	100.00%
Wardens			
SCC			
ICT			
Communications	1	1	100.00%
Total	12	4	33.33%

Stage 1 complaints have experienced a notable decrease this quarter, with car parks equating to 4 of the 12 complaints. Stage 2 complaints continue its downward trend with 0 complaints being received for the quarter.

Other enquiries:

Breakdown of Data (Service Area) Qtr 2	Total Service Requests/Service request updates / General Enquiries	Total Compliments	Member Enquiries
Benefits		1	1
Car Parks	19		1
Adaptions			1
Castle	2		1
CCTV			2
Commercial Assets	4		8
Council Tax & Revenues	6		
Customer Services	12	3	4
Democratic Services			
Elections			
Environmental Health	9	1	3
Joint Waste	18		3
Land Charges / Legal (Right to Buy)	1		
Multiple Depts	1		2
Partnerships			1
Planning & Development	4		4
Private Sector			2
Street Scene	33	6	61
Theatre (Assembly Rooms)		3	
Wardens			
SCC	16		16
ICT			
Total	126	14	110

Learning from complaints

In the third quarter, the council has continued to make significant strides by learning from complaints and its commitment, to enhancing the customer journey, improve communication, and boost customer satisfaction and trust in the council's dedication to addressing concerns. This initiative supports the integration of complaint handling, fostering a culture of continuous improvement where feedback from complaints is used to refine and enhance services across the board.

As changes are integrated into the organisation and service areas, a shift in performance was observed in the second quarter, and while this is not reflected in the quarter 3 figures. The challenges experienced were quickly identified and by working collaboratively with the service areas, this should see a significant improvement in quarter 4.

Service areas have remained dedicated to thoroughly investigating and responding to all complaints, and this is evidenced in improved response letters, and the newly implemented department process for repairs, where contact with the customer remains throughout the lifecycle of the complaint process.

The newly established Housing Complaints Working group met for the first time this quarter and discussed ways in which learning from complaints can be captured and it is envisaged that this will progress to fruition in quarter 4.

An action tracker has been implemented to ensure that complaints are managed throughout their entire lifecycle. This measure helps reduce stage 2 complaints by addressing any outstanding issues from stage 1 complaints.

Looking forward

The council continues its efforts in analysing data and customer satisfaction metrics, collaborating closely with service areas to pinpoint valuable insights and areas for improvement. This ongoing effort will ensure that feedback is effectively utilised to enhance processes and elevate the overall quality of service delivery. By maintaining a proactive approach to learning from complaints, the council aims to foster a culture of continuous improvement and responsiveness to residents' needs.

Throughout quarter 4, the council will:

- Continue its efforts to improve complaint response times.
- Finalise complaint response templates
- Provide some case studies for learning from complaints to include:
 - The Complaint
 - What did we do?
 - What is the ongoing service improvement?

7. Health and Safety Q3 2024/25

Here is the health and safety performance information:

Employee Indicators

- Number of accidents to employees 4
- Number of accidents to employees that are to be reported under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR 1995) 0
- Days lost due to accidents at work to employees 6 days
- Number of violent or threatening incidents reported 0
- Number of training days delivered 12
- Number of health and safety audits completed 7

Public Indicators

- Number of accidents to the public 2

Accidents / First Aid incidents involving Employees

Main cause	2023					2024				
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Total 2023	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Total 2024
Animal / Insect						1				1
Contact with Sharp Object	2		2	2	6	1	1	1	1	4
High Pressure liquid		1*			1					
Hot Surface / Liquid		1			1				1	1
Manual Handling	2	2			4	1	1		1	3
Slip, Trip or Fall	2	3	2	1	8	3		1	1	5
Stuck by Moving Object				1	1		1	1		2
Struck Stationary Object	2			1	3					
Violence and aggression								1		1
					Total 24					Total 17

*Ejection of hire pressure water from jet wash following failure of hose fitting resulting in injury to finger and notification to the Health and Safety Executive

Accidents / First Aid incidents involving Members of the Public

Main Cause	2023					2024				
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Total 2023	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Total 2024
Animal / Insect										
Contact with Sharp Object			1	1	2					
Manual Handling				1	1					
Medical	1	1			2	1	3			4
Slip, Trip or Fall	1	1	2	2	6	1	1		2	4
Sports Related								1		1
Stuck by Moving Object	1	2								
Struck Stationary Object		1			1					
Violence and aggression										
					Total 12					Total 9

Correct as of 21/1/24

Additional information

Cabinet approved the H&S policy at the end of November, and this has now been disseminated to all staff and Members for review and signing off.

IOSH Managing Safely Course delivered to 21 colleagues so far across the organisation with a further course scheduled for Q4.



Support provided to a number of service areas following significant weather events that meant the adjustment of events and cancelling of some due to storms.

Over 18,000 attended the Fireworks event in November- which the health and safety team were instrumental with key agencies such as police and St Johns alongside the events team to run a safe event.



Appendices.



Appendix 1 - Strategic Projects Highlight Reports



Asset management Strategy

CP2022-25_PD_34 Asset management Strategy	Purpose: Development of Asset Management Strategy to guide future of built assets owned by the council. Scope: Review of existing strategy, costed stock condition survey, development of overarching strategy, development of asset management plans.			Managed By	Paul Weston
Activities since last period	<ul style="list-style-type: none"> • Surveys completed. • Gap analysis completed. • Additional surveys quoted. • Final draft circulated to Asset Strategy Steering Group for review. • Cabinet approved Asset Management Strategy for implementation in November 2024. <p>The next phase of the project for 205/26 will be the production of detailed Asset Management Plans for each asset.</p>	Planned Activities for next period	<ul style="list-style-type: none"> • Collate amendments from Asset Strategy Steering Group • Finalise Document • Forward Plan for approval • Identify resources for implementation 	Amber/Red Areas	Amber - project progressing and at final draft stages.
Risks including Stakeholder Issues, budget and timing	<ul style="list-style-type: none"> • Needs to ensure there are links with SHRP project. • Needs to link to CPC process. 	Resourcing Requirements	Resources for implementation phase to be considered	Decisions required from CMT	None.
Note	Cabinet approved Asset Management Strategy for implementation in November 2024.	Date	22-Jan-2025	Author	Paul Weston


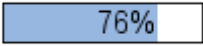
	The next phase of the project for 205/26 will be the production of detailed Asset Management Plans for each asset.				
	Strategy to be considered at cabinet on 21st November.(RB)		18-Oct-2024		Pardeep Kataria
	Final draft of document is with the Asset Strategy Steering Group for approval before being put on forward plan for final approval.		16-Jul-2024		Paul Weston
	Final draft to be presented to Asset Strategy Steering Group before proceeding to Cabinet [May 24].		16-May-2024		Paul Weston
	Finalising document to reflect Scrutiny Committee comments.		14-Jul-2023		Paul Weston
	Existing policy review completed. Draft policy reviewed by Scrutiny. Amendments to reflect Member comments are in progress with final draft to be presented to Cabinet for approval. Detailed Asset Management Plans will follow on from the strategy.		11-May-2023		Paul Weston
	Final amendments to be made in readiness for sign off by Members.		31-Mar-2023		Paul Weston
	Draft document has been reviewed by the Asset Strategy Steering Group and Scrutiny. Some Amendments are required. The initial process of Asset Management Plan development has commenced.		03-Jan-2023		Paul Weston

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_034_KW1 Costed condition survey		 100%	Paul Weston	Condition survey of housing and non-housing complete. Additional surveys of high-rise and non-traditional properties complete.

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_034_KW2 Development of new Strategy and Plans		 100%	Paul Weston	Asset Management Strategy now approved. Next phase will be development of Asset Management Plans

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_034_KW3 Review of existing Strategy		 100%	Paul Weston	Review completed by external consultants with Gap Analysis produced.

FHSF


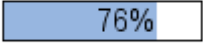
CP2022-25_TCP_04 FHSF	Delivery of £21.65m project to renew the town centre			Managed By	Anna Miller
Activities since last period	Castle Gateway application approved at planning committee. The Market street properties enabling works are underway. Flex steels are in place. Tec 2 is nearing completion with only a few areas where windows need fitting. St Eds square civils are ongoing and the work is on programme. Resolution of Middle Entry accessibility issues.	Planned Activities for next period	Continue Comms strategy and newsletter. Start to engage with the market stall holders about relocation when the St Eds project is finished. Resolution of programming around the Castle Gateway project. Report to Full Council on Middle Entry project.	Amber/Red Areas	
Risks including Stakeholder Issues, budget and timing	RAAC and liabilities. Market Street properties and their condition.	Resourcing Requirements		Decisions required from CMT	
Note	Work on the Peel Cafe nears completion with anticipated handover in January. The TEC2 building is almost completed and ready for handover. The flex is moving forwards at a pace with steels in place. St Edithas square and gateway planning applications were approved at planning committee. St Edithas square project has commenced. Discussions are ongoing with the Middle Entry project.	Date	20-Jan-2025	Author	Anna Miller

	<p>Work moving forwards. College topping out ceremony. ISG went into administration leading to short delay for Peel Cafe although no overall impact on programme.</p> <p>Submission to MHCLG relating to spend timescales.</p> <p>ME and gateways fixed costs approved by PB. (AM)</p>		15-Oct-2024		Pardeep Kataria
	<p>Work has started at the Peel Cafe and TEC. Report to go to Full Council to request Capital Money in February. Work on the FLEX/ME entry project is awaiting a Full Council decision on budget, to be able to move forwards. Awaiting Govt to approve extensions to spend deadlines to allow commitment of spend by September and actual spend by end March 2025.</p>		03-Jun-2024		Pardeep Kataria
	<p>Costs emerging from the contractor following further design and survey work, coupled with increased costs has led to challenging discussions. The original grant fund from Government will not cover the increased costs and discussions are ongoing around how to mitigate the increases. A report will go to Full Council to request capital money to support the project.</p>		31-Oct-2023		Anna Miller
	<p>Work is on track and in control. RIBA 2 is completed with RIBA 3 well underway. Legals are nearing completion on remaining acquisitions. A number of applications have been approved by planning committee with the college application submitted and awaiting</p>		14-Jul-2022		Anna Miller


	determination. Challenges persist, the biggest one being budget. The monthly programme Board and Delivery Team Meetings including the quarterly ISaG/Cabinet and Audit and Governance Sub-committee provide the necessary Governance framework. A recent Audit of the programme has resulted in substantial reassurance.				
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Gungate


CP2022-25_TCP_05 Gungate	Purpose: To regenerate a multi-million pound vacant edge of town centre site, in the ownership of the Council and external stakeholders. Scope: Development of land north and south of Spinning School Lane into a mixed use site which will support the town centre by delivering uses that complement the existing offer and increase footfall, choice and prosperity.			Managed By	Anna Miller
Activities since last period	Work underway on understanding rights of way constraint on Gungate North. Charities Commission have given the go ahead for SCC to dispose of Tamyouth building. Member briefing on Gungate. Staff conference briefing.	Planned Activities for next period	Starting the process of vacant possession of Tamyouth and Magistrates court. Ongoing discussions on rights of access Car parking demand study Addition land valuation required.	Amber/Red Areas	
Risks including Stakeholder Issues, budget and timing	Legal issue around rights of way access and the police station - needs resolution. Rekom, the owners of ATIK have gone into administration with a number of the companies that they own. New owners have been in contact and they have yet to decide what happens to ATIK long term. Risk to project to be able to split the building with Buzz.	Resourcing Requirements	The Gungate capital pot has been substantially reduced as a result of Full Council decision (27/2/24) wrt to the FHSF budget issues	Decisions required from CMT	


Note	Date	Author
<p>There has been confirmation from the Charities Commission that SCC can dispose of the Tam youth Centre to the Borough Council, along with other landholding on Gungate North. Discussions continue with the new owners of ATIK to discuss the split with the Buzz Bingo site. Contact has now been made.</p> <p>Discussions have also been held with a number of architects/end users.</p>	20-Jan-2025	Anna Miller
<p>Land assembly on Gungate North is progressing well to acquire SCC land/properties.</p> <p>Removal of the covenant on their youth centre property is close to being removed which will allow acquisition to go ahead.</p> <p>Plans to split bingo hall from ATIK nightclub have been developed and negotiations with new nightclub owners are taking place.</p> <p>Gungate Briefing to ELT delivered</p>	18-Oct-2024	Pardeep Kataria

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_005_KW1 Delivery north site		<div style="width: 13%;"><div style="width: 13%;"></div></div> 13%	Anna Miller	Discussions ongoing with new ATIK owner around the future of the site/split with Buzz Bingo.



Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_005_KW2 Delivery south site		<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	Joanne Goodfellow; Thomas Hobbs; Karen Moss	Lease acquired from NCP (AM)

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_005_KW3 Land Assembly north site		<div style="width: 76%;"><div style="background-color: #4f81bd; color: white; padding: 2px;">76%</div></div>	Thomas Hobbs	The Charities Commission has given approval for the disposal of the Tamyouth Centre to the Borough Council. Vacant possession has been served on guardians in the magistrates court and on the final few occupants at the Tamyouth Centre. Legals are being discussed.



Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_005_KW4 Land Assembly south site		<div style="width: 95%;"><div style="background-color: #4f81bd; color: white; padding: 2px;">95%</div></div>	Joanne Goodfellow; Thomas Hobbs	NCP in Borough Council Control. Unfortunately the Bennetts taxi site was sold to a private developer but discussions have been held anyway.

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_005_KW5 Partnership with Homes England - Governance		<div style="width: 100%;"><div style="background-color: #4f81bd; color: white; padding: 2px;">100%</div></div>	Thomas Hobbs	The Borough Council has a MOU with Homes England.



HRA Business Plan



CP2022-25_PD_27 Housing Revenue Account (HRA) Business Plan (2024- 2054)	Purpose: This plan will detail our ambitions over the next 30 years as to how we manage and look to improve our housing stock. Specifically reviewing the GF contribution to the HRA as part of EMT agreed financial sustainability planning Scope: Reviewing the HRA financial planning around the business plan and how it contributes to the corporate agenda			Managed By	Tina Mustafa
Activities since last period	<ul style="list-style-type: none"> • Cabinet 22nd Feb 2024 approved consultation • April - June Discussions with tenants workshop on consultation priorities • Glen Smith attending ELT update in November with a refreshed baseline 	Planned Activities for next period	<ul style="list-style-type: none"> • Glen Smith refreshing levers for income and expenditure options to balance the HRA • Options being impact assessed to inform cabinet update Feb 2025 	Amber/Red Areas	longer-term financial challenges
Risks including Stakeholder Issues, budget and timing	Carbon neutral targets will significantly impact on HRA resources (i.e. EPC c+ and electric charging; fuel poverty) HRA currently showing funding gap	Resourcing Requirements	Consultancy support and corporate project team involving finance. Given alignment with self-assessment likely to require project manager	Decisions required from CMT	None
Note	Housing Revenue Account Business plan on the forward plan for 8th March 2025. Detailed financial modelling under way on the baseline, associated costs arising from RTB and rent standard changes. Workshop with tenants consulting on levers to balance resulting in	Date	15-Jan-2025	Author	Tina Mustafa


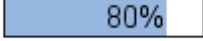
	modelling on GF and VFM contributions; rent flexibility and service standards as well as wider assumptions being tested on decarb levels and net zero.				
	HRA viability project forms part of the social housing regulatory programme and work is progressing on the baseline position impact assessment of the options to remedy with a view to report latest position to cabinet in Feb 2025 (TM)		16-Oct-2024		Pardeep Kataria
	HRA consultation plan on spending priorities is due to be launched at the tenant conference on the 16 Sep 2024. The HRA Business plan was reported to cabinet on the 22 Feb 2024 and the associated delivery plan is reflected in the 2023/24 work programme.		19-Jul-2024		Pardeep Kataria
	HRA Business plan modelling on track with Cabinet report planned 22/2/24. Portfolio Holder and Leader involved in briefings to Board and associated workshops. HRA showing balanced position over MTFS with longer term challenges from horizon scanning		23-Jan-2024		Tina Mustafa

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_027_KW1 Commission work on HRA business plan drafting and ambitions			Lee Birch; Tina Mustafa	HRA Business Plan modelling complete by external consultants


Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
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CP2022-25_PD_027_KW2 Financial Update and Scenario Planning			Joanne Goodfellow	Reported to Cabinet 22/2/24 with full scenario and stress financial testing completed. Consultation with tenants to start
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Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_027_KW3 Update HRA business plan to members (prospectus and adopted plan)			Lee Birch; Tina Mustafa	Will require statutory consultation and alignment with self-assessment



Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_027_KW4 HRA Business Planning Tenant Leaseholder Engagement			Tina Mustafa	Tenant Inclusivity Plan (Tenant & leaseholder engagement) on the forward plan for March 2025 - reported along with Getting to know you better survey results showing impact on service delivery for the service

Local Government Boundary Review

CP2022-25_PD_08 Local Government Boundary Review	An electoral review of Tamworth Borough Council. Purpose: is to consider the number of councillors elected to the council, the names, number and boundaries of the wards, and the number of councillors to be elected to each ward.		<input type="text" value="5%"/>	Managed By	Zoe Wolicki
Activities since last period	December 24: Kick off meeting taken place with Local Government Boundary Commission to outline project scope. Oct 24: awaiting formal communication from boundary commission for project inception as at 09/09/24	Planned Activities for next period	Dec 24: Project to commence January 2025 and to conclude with all out elections in May 2028. Working group set up initial meeting arranged for 6 January 2025 to brief team and agree draft terms of reference. Oct 24 in line with boundary commission requirements	Amber/Red Areas	none
Risks including Stakeholder Issues, budget and timing	None	Resourcing Requirements	none	Decisions required from CMT	none
Note	Kick off meeting taken place with Local Government Boundary Commission to outline project scope. Project to commence January 2025 and to conclude with all out elections in May 2028. Working group set up initial meeting arranged for 6 January 2025 to brief team and agree draft terms of reference.	Date	02-Jan-2025	Author	Zoe Wolicki

	Activities for next period are for cross party working group to be set up. Full member and group leader briefings and project plan to be developed.				
	Still awaiting contact from boundary commission		22-Oct-2024		Pardeep Kataria
	awaiting contact from boundary commission		17-Jul-2024		Zoe Wolicki
	Still awaiting communications from commission.		16-May-2024		Pardeep Kataria
	still awaiting communications from commission		24-Jan-2024		Zoe Wolicki
	Still awaiting boundary commission notification		30-Oct-2023		Pardeep Kataria

Net Zero

<p>CP2022-25_TCP_07 Net Zero</p>	<p>Purpose: Make the Council's activities net-zero carbon by 2050 with aspiration to achieve 2030 should the council be financially able to do so Scope: 1) Ensure that political and chief officers leadership teams embed this work in all areas and take responsibility for reducing where practicable, as rapidly as possible, the carbon emissions resulting from the council's activities; 2) The Council (including the Executive and Scrutiny Committee) consider the impact of climate change and the environment when adopting and reviewing Council policies and strategies; 3) Receive a report to the relevant scrutiny committee regarding the level of investment in the fossil fuel industry that any of our investments have; 4) Ensure that all reports in preparation for the 2021/2022 budget cycle and investment strategy will take into account the actions the Council will take to address this emergency;</p>			<p>Managed By</p>	<p>Anna Miller</p>
<p>Activities since last period</p>	<p>Drafts received and reviewed. ISAG sign off received.</p>	<p>Planned Activities for next period</p>	<p>Cabinet sign off in January.</p>	<p>Amber/Red Areas</p>	


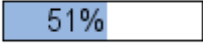
Risks including Stakeholder Issues, budget and timing		Resourcing Requirements		Decisions required from CMT	
Note	The Climate Change Action Plan, Adaptation plan and communications plan were at ISAG in December and it is planned to go to Cabinet in January.	Date	20-Jan-2025	Author	Anna Miller
	Climate change on forward plan. Scrutiny in December. (AM)		15-Oct-2024		Pardeep Kataria
	New Climate Change Officer Starts at the end of February, who will be tasked with moving the project forwards.		24-Jan-2024		Anna Miller

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_007_KW1 Scope 1 - 3		<div style="width: 100%;"><div style="width: 100%; background-color: #4f81bd; color: white; text-align: center;">100%</div></div>	Anna Miller	Policy change approved for additional resource to support Scope 1.

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_007_KW2 Scope 4		<div style="width: 100%;"><div style="width: 100%; background-color: #4f81bd; color: white; text-align: center;">100%</div></div>	Anna Miller	<p>Following a discussion at CMT the following were noted:</p> <p>Information / budgets were included in the 2020/21 MTFS & report ensuring <i>'that all reports in the preparation for the 2021/22 budget cycle and investment strategy will take into account the actions the Council will take to address this emergency'</i>.</p> <p>Budget provision of £105K for 20/21 budget to fund emerging climate change initiatives was made.</p>

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_TCP_007_KW3 Stage 2		<div style="width: 95%;"><div style="width: 95%; background-color: #4f81bd; color: white; text-align: center;">95%</div></div>	Anna Miller	The climate change action plan was at ISAG in December and will be formally signed off in January 2025.

Social Housing Regulatory Programme



CP2022-25_PD_47 Social Housing Regulatory Programme	<p>The Social Housing Regulatory Programme is the Councils organisational wide approach to ensuring compliance with the Social Housing (Regulation) Act 2023. It is focused on RSH inspection preparedness and there is 8 projects across the programme with complex interdependencies highlighted.</p>			Managed By	Tina Mustafa
Activities since last period	<ul style="list-style-type: none"> • Self-referral to RSH on 12 Aug 24 resulting in weekly reports to leadership group progress • Housing board received progress on 1st Oct 24 • Corporate scrutiny and cabinet approved recommendations on 9/10 Oct 2024 	Planned Activities for next period	<ul style="list-style-type: none"> • SHRP dashboard created in Pentana to migrate all the improvement plan workstreams • Detailed discussions ongoing with RSH with their decision on the referral by the end of October • Cabinet report on the Forward plan for Nov/Dec to track progress 	Amber/Red Areas	<ul style="list-style-type: none"> • Self-referral being considered by ELT weekly • As per individual Project Plans • Risk Map to be shared with Audit & Governance
Risks including Stakeholder Issues, budget and timing	Risks identified and reported separately	Resourcing Requirements	Resourcing plan being prepared by Programme lead to support improvement plan organisationally with scaling up of resourcing on key programme areas	Decisions required from CMT	
Note	Social Housing Regulatory Programme is co-ordinated via AD neighbourhoods with organisational wide input. Regulatory monitoring underway with next meeting 28/2/25. Full performance dashboard being launched with ongoing development - this includes benchmarking of key performance data across the sector	Date	15-Jan-2025	Author	Tina Mustafa

	<p>Dedicated resourcing is in place until December 2025 to accelerate progress on the programme and this includes</p> <ul style="list-style-type: none"> • Compliance review and remedy of overdue actions • Policy schedule being fast tracked • Service standards drafted for consultation and • Enhanced performance dashboard through Pentana 		16-Oct-2024		Pardeep Kataria
	<p>TMM updated ELT on 17 July 2024 with programme progress. Associated risks have been captured in the corporate risk register. Reports are due to the homelessness and housing advisory board on the 30 July 2024 and Cabinet 29 Aug 2024.</p>		19-Jul-2024		Pardeep Kataria
	<p>Programme actions on track - Red risk areas identified as part of the Programme control</p>		23-Jan-2024		Tina Mustafa
	<ul style="list-style-type: none"> • Cabinet approved latest update 26/10/23 with next cabinet report planned for 14/03/24 • Homelessness & Housing Advisory Board to consider 13/2/24 latest performance on TSMS; Satisfaction survey and self-referral options • Programme OPs meetings diarised until year end • Internal infrastructure supporting the Programme established with all meeting/agenda framework • Tenant Consultative Group - Options paper on additional 		23-Jan-2024		Tina Mustafa



	advocacy to be considered March 2024 <ul style="list-style-type: none">• Communication Strategy to be scoped				
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Strategic Review of Leaseholder Service Charges



CP2022-25_PD_48 Strategic Review of Leaseholder Service Charges	<p>The key outcomes will be:</p> <ul style="list-style-type: none"> • Review of the processes used to identify properties for inclusion in programmes • Review of communications relating to leasehold service charges • Review of the legal position related to service charges • Review of contractors and contract pricing • Proposals for interacting with Leaseholders • Assessment of Tamworth Borough Council practices against Best Practice in the sector. 			Managed By	Paul Weston
Activities since last period	<ul style="list-style-type: none"> • Consultant has presented draft report • Draft report considered by the working group • Next steps document outlined • Update letter has been sent to leaseholders. • Cabinet approved report in October 2024 <p>Draft notices have been issued and will continue through to February 2025.</p>	Planned Activities for next period	<ul style="list-style-type: none"> • Report on consultant report and proposals to be presented to Corporate Scrutiny in August • Leaseholder policy to be developed to address outcome of consultant report • Consultation letters to be issued in January 2025 • Policy document to be updated for March 2025 	Amber/Red Areas	None at this time
Risks including Stakeholder Issues, budget and timing	None at this time	Resourcing Requirements	<ul style="list-style-type: none"> • Need to consider the resources that will be required to deliver the 	Decisions required from CMT	



			enhanced levels of service outlined in the report. • Likely to have ongoing staffing and consultancy requirements.		
Note	Outcomes of strategic review reported to Cabinet in October 2024. First batch of consultations under new process with updated documentation are due to be issued in January 2025. Final work around formal policy document to be completed by March 2025.	Date	16-Jan-2025	Author	Paul Weston
	Report considered at corporate scrutiny committee on 9th October. Cabinet considered report and agreed all original recommendations contained in the report. (RB)		18-Oct-2024		Pardeep Kataria
	Report complete and presented to working group. Draft report on outcomes and wider policy to be presented to Scrutiny Committee in August 2024.		16-Jul-2024		Paul Weston

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_048_KW 1.Procurement of external resources		 100%	Trevor Wylie	Consultant in place and work has now commenced with initial meetings having taken place.


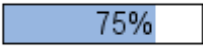
Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_048_KW 2.Technical Assessment		 100%	Trevor Wylie	All work complete and outline in consultant report.

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_048_KW 3.Legal Assessment		 100%	Trevor Wylie	All work complete and outlined in consultant report

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_048_KW 4.Financial Assessment		 100%	Trevor Wylie	All work complete and findings set out in consultants report

Key workstream - Action code & title	Status	Progress	Assigned To	Latest note
CP2022-25_PD_048_KW 5.Customer Engagement		 85%	Trevor Wylie	Standard suite of letters agreed, initial letters issued in December 2024 with remaining letters to be issued January 2025. Wider work around engagement to continue including the inclusion of leaseholder in the Housing & Homelessness Advisory Board.

Sustainability Strategy to resolve long term MTFS position

<p>CP2022-25_PD_43 Financial Stability plan to resolve long term Medium Term Financial Strategy position</p>				<p>Managed By</p>	<p>Joanne Goodfellow</p>
<p>Activities since last period</p>	<p>Cabinet in August approved the Budget and MTFS planning Process 2025/26 report which set out a number of actions in line with the Financial Stability plan to identify opportunities for savings and additional income and to reduce the requirement for the use of GF balances to balance the budget, including tasking budget managers with the identification of 5% - 10% savings from their budgets; and looking at two areas per year for zero-based budgeting; identifying opportunities for spend to save projects utilising the transformation reserve; and longer term service transformation projects to consider alternative delivery models, increased commercialisation, the review of non-statutory services, etc. The report also set out a timetable for the achievement of the budget process, with dates for CMT and Cabinet meetings, all Member budget workshops and a Joint Scrutiny (Budgets) meeting.</p>	<p>Planned Activities for next period</p>	<p>Draft Budget & MTFS report to Cabinet 23rd January 2025. Work ongoing to identify savings and additional income to balance budget. Financial Resilience plan to be developed and corporate project established. Final budget report to Cabinet and Council in February 2025, along with Fees & Charges report setting revised fees and charges for 2025/26.</p>	<p>Amber/Red Areas</p>	

	<p>ELT and Cabinet budget meeting and all Members budget consultation workshop in October.</p> <p>Emerging policy changes and capital schemes reported to EMT on 4th November.</p> <p>Leader's budget workshop held 18th November.</p> <p>Base budget report to Cabinet 21st November. This identified £19m GF shortfall by 2029/30 based on latest projections.</p>				
Risks including Stakeholder Issues, budget and timing		Resourcing Requirements		Decisions required from CMT	
Note	<p>Draft Local Government Finance Settlement issued December indicated no overall increase on last year for Tamworth. Continuation of New Homes Bonuses and Funding Floor and Recovery Grant for one year only. Confirmation of business rates reset and redistribution of funding from 2026/27, likely to have negative impact on Tamworth. Certainty of a three year settlement from 2026/27 but there is now an immediate need to identify savings for MTFS. Savings options have been identified based on 5-10% savings/increases in income from budget holders; persistent underspends have been offered up; a review of policy changes/growth items and the draft capital programme has been undertaken to reduce expenditure; work on the longer term Financial Resilience Plan as recommended by the CPC is in progress.</p>	Date	14-Jan-2025	Author	Joanne Goodfellow

	Draft Base Budget Forecasts Report approved Cabinet 21st November. Work in progress to identify savings/additional income to balance the budget eg zero based budgeting; managers tasked with identifying 5-10% savings; opportunities to become more commercial.		13-Dec-2024		Joanne Goodfellow
	Cabinet in August approved the Budget and MTFS Planning Process 2025/26 report which set out a number of actions in line with the Financial Stability plan to identify opportunities for savings and additional income and to reduce the requirement for the use of GF balances to balance the budget, including tasking budget managers with the identification of 5% - 10% savings from their budgets; and looking at two areas per year for zero-based budgeting; identifying opportunities for spend to save projects utilising the transformation reserve; and longer term service transformation projects to consider alternative delivery models, increased commercialisation, the review of non-statutory services, etc. The report also set out a timetable for the achievement of the budget process, with dates for CMT and Cabinet meetings, all Member budget workshops and a Joint Scrutiny (Budgets) meeting.		18-Oct-2024		Joanne Goodfellow
	Productivity Plans to Cabinet June 24		22-May-2024		Rob Barnes

Equality, Social Inclusion and Health Impact Assessment (ESHIA)

An ESHIA is a review of a new or existing policy, strategy, project, report or service change to establish whether this has a differential impact on specific equality groups and identifies how we can improve equality of opportunity for different groups of people.

An ESHIA aims at improving Tamworth Borough Council’s work, by promoting equality, social inclusion, health and wellbeing by ensuring that the proposed or existing policy promotes equality and can benefit a wide range of people.

Details

Title of the proposal	Quarter 3 Performance Report	
Director responsible for the project or service area	Zoe Wolicki	
Officer completing the assessment	Zoe Wolicki	
Date conducted	24 January 2025	
Who are the main stakeholders?		
What is being assessed?	A decision to review or change a service	
	A strategy, policy, report or procedure	x
	A function, service, or project	
What kind of assessment is it?	New	x
	Review of existing	

Part One - Initial screening:

This section should be used to carry out an initial screening of changes or decisions to help to decide whether a full ESHIA is required.

The following six screening questions are designed to assess whether this proposed change is likely to have an impact on equality, social inclusion, health and wellbeing.

		Yes	No
1	Does this new or revised project, proposal, policy, report, procedure likely to have an impact?		x
2	Does the proposal seek agreement to a key decision involving allocation of resources, such as changes in funding or resources, initiation of a new programme or project or procurement?		X
3	Does the proposal seek agreement on restructuring or reorganising of staffing?		X
4	Will this policy or proposed change have any impact on potential suppliers?		X

5	Does this policy or proposed change impact on any HR policy or practice within the council?		X
6	Does this policy or proposed change have any implications for equalities, social inclusion and health and wellbeing not covered above?		X

1. If the answer is **no** to all the questions, please provide a summary below outlining why this conclusion has been reached.
2. If the answer is **yes** to any of the questions, please conduct the full ESHIA as detailed in Part two.

If you are unsure of any of the answers, please seek advice from Human Resources.

Summary of initial screening outcome:

As this is a performance report, it does not entail any significant changes to policies or procedures that could impact customers, stakeholders, or staff. Therefore, a comprehensive assessment is not necessary.

Decision	Yes	No
Initial screening only	X	
Proceed to Part Two, full assessment		X

Initial screening completed by	Zoe Wolicki
Date	24/01/25

Full screening completed by	
Date	

Equality, Social Inclusion and Health Impact Assessment (ESHIA)

Part Two: Full assessment

Section 1

The purpose of the project, proposal or decision required. Set out the aims, objectives, purpose and outcomes of the area being impact assessed. Are any other functions, policies or services linked to this assessment?

Section 2

Evidence used and considered. Include analysis of any missing data.

Section 3

Consultation undertaken with interested parties who will/may be affected proposal? What were the outcomes of the consultation?

Section 4

What are the potential or actual impacts of the proposal? Please consider both the direct and indirect impact and refer to the guidance for additional information.

Impact Area	Impact? Positive (P) Negative (N) Neutral (Ne)	Details of the impact	Action to address negative impact
Protected Characteristic, as outlined in the Equality Act 2010			
Age			
Disability			
Gender reassignment			
Marriage and civil partnership			
Pregnancy and maternity			
Race			
Religion or Belief			
Sex			
Sexual Orientation			

Are there socio-economic groups likely to be affected? If yes, please provide detail below			
Other social exclusion			
Digital exclusion			
Veterans and serving members of the armed forces and their families			
Young people leaving care			
Health and Wellbeing: Individuals and communities in Tamworth	Impact: Positive (P) Negative (N) Neutral (Ne)	Explanation	Action to address negative impact
Will the proposal have a direct impact on an individual's health, mental health and wellbeing?			
Will the proposal directly impact on housing?			
Will there be a likely change in demand for or access to public services such as health and social care services?			
Will there be an impact on diet and nutrition?			
Will there be an impact on physical activity?			
Will there be an impact on transport, travel and connectivity?			
Will there be an impact on employment and income?			

Will there be an impact on education and skills?			
Will there be an impact on community safety?			
Will there be an impact on the environment, air quality, climate change?			

If there are no adverse impacts or any issues of concern or you can adequately explain or justify them, please move to section 6.

Section 5

Where a potential negative impact has been identified, can continuation of the proposal be objectively justified? If yes, please explain your reasons.

Section 6: Decisions or actions proposed

The assessment may result in some recommendations or suggestions to mitigate any negative impact and maximise positive impacts or actions to reduce the risk of an adverse impact.

Section 7: Monitoring arrangements

Who will be responsible for monitoring	
Frequency of monitoring	
Where will the impact assessment be reported to?	
Where this impact assessment will be stored and for how long	

Section 8: Summary of actions to mitigate negative impact (if required)

Impact Area	Action required	Lead officer/responsible person	Target date	Progress



Corporate Scrutiny Work Plan

2024 - 2025

To provide effective scrutiny of the achievement of the Council's strategic priorities by scrutinising the performance of the Executive.
To review and scrutinise the performance and functions of other public bodies, statutory undertakers or other such organisations, including voluntary and not for profit institutions, who provide or facilitate the provision of public services within the Borough.

The Committee shall review and scrutinise matters relating to:-

- Forward Plan
- Quarterly performance reports
- Corporate plan
- Major Council led projects
- Investment Strategy
- HRA function
- Bi-annually review and scrutinise matters relating to the Local Authority Trading Company's activities and performance.

To undertake such other scrutiny activities, relevant to the committee's scope, as may be required in relation to the performance of the Council, governance, financial management and discharge of statutory functions.

Membership: Councillors S Smith (Chair), A Wells (Vice-chair), G Coates, M Couchman, H Hadley, T Jay, K Norchi, B Price and M Summers

Date	Issue	Reason	Lead Member	Lead Officer
6 th February 2024	Quarter 3 2024/2025 Performance report	Quarterly Report	Leader of the Council	AD, People
	Corporate Peer Challenge Report and Action Plan		Leader of the Council	ED, Organisation
	Corporate Plan 2025 to 2030	Committee Remit	Leader of the Council	ED, Organisation
TBC	Quarter 4 2024/2025 Performance report	Quarterly Report	Leader of the Council	AD, People
TBC	Tree Policy	Member request: matter of importance to residents	PH Environmental Sustainability, Recycling & Waste	Hannah Peate
TBC	HRA Investment Strategy	To be considered in 2025	PH for Housing, Homelessness and Planning	Paul Weston
TBC	Housing Voids Update	Following on from Recommendations approved by Cabinet in June 2024	PH for Housing, Homelessness and Planning	AD, Assets

Items Considered/Recommendations to Cabinet/Further Action

Date of meeting	Item	Action	Cabinet Meeting Date	Response from Cabinet /Any further action
13/08/24	Update on Strategic Leasehold review	Recommendations to be made to Cabinet	29/08/24	Cabinet agreed to look at the recommendations when the report is presented at Cabinet on 10 th October and provide a written response to Corporate Scrutiny.
09/10/24	Update on Strategic Review of Leasehold Service Charges	Recommendations to be made to Cabinet	10/10/24	Following a discussion Cabinet did not approve the recommendations from Corporate Scrutiny.

Items Considered/No further action

Date of meeting	Item	Action
25/06/24	Quarter 4 Performance Report	Recommendations endorsed – continuing quarterly updates
	Sustainability Strategy and Productivity Plan	Recommendations endorsed
13/08/24	Quarter 1 2024/2025	Recommendations endorsed – continuing quarterly updates

	Performance report	
	Vision and Corporate Plan	No specific recommendations to endorse
	Marion House front Desk and Committee Meetings	Recommendations endorsed
	ICT Strategy Update	No specific recommendations to endorse
	Update on commercial lease negotiations	Recommendations endorsed
	Update on commercial lease	Recommendations endorsed
09/10/24	Social Housing Regulatory Programme Update	Recommendations endorsed
	Update on Housing Repairs Contract	No specific recommendations to endorse
19/11/24	Quarter 2 2024/2025 Performance report	Recommendations endorsed
	Council Housing - Tenancy Management Policy	Recommendations endorsed

Upcoming Corporate Scrutiny Committee Meetings

Meeting dates:	6/02/25 18/03/25
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Scrutiny Work Planning Proposal Form (for inclusion on the workplan)

Title of proposed Scrutiny Item	
Scrutiny Committee making the request:	
Date the Committee agreed to add the item to the Workplan:	
Brief Background (Why has this come to Scrutiny attention? (egs Forward Plan/ Complaints/petition, etc):	
Which Corporate Priority will this scrutiny work help the authority achieve? CORPORATE PLAN 2022-2025 Tamworth Borough Council	
Purpose and scope of the Item (Why do you want to undertake this review? What detail do you want this work to cover?):	
Method of Scrutiny: (Agenda Item/single issue meeting/short scrutiny review See notes):	
Proposed meeting date for Scrutiny (where applicable):	
Intended Outcomes:	
Information requested for inclusion in the Item research and deadlines:	
Who are the stakeholders/ potential invitees? (eg.officers/Cabinet Members/Voluntary Sector/Public etc)	

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