



# CABINET

16 October 2014

A meeting of the CABINET will be held on Thursday, 23rd October, 2014, 6.00 pm  
in Committee Room 1 Marmion House, Lichfield Street, Tamworth

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## A G E N D A

### NON CONFIDENTIAL

**1 Apologies for Absence**

**2 Minutes of the Previous Meeting** (Pages 1 - 6)

**3 Declarations of Interest**

*To receive any declarations of Members' interests (pecuniary and non-pecuniary) in any matters which are to be considered at this meeting.*

*When Members are declaring a pecuniary or non-pecuniary interest in respect of which they have dispensation, they should specify the nature of such interest. Members should leave the room if they have a pecuniary or non-pecuniary interest in respect of which they do not have a dispensation.*

**4 Question Time:**

To answer questions from members of the public pursuant to Executive Procedure Rule No. 13

**5 Matters Referred to the Cabinet in Accordance with the Overview and Scrutiny Procedure Rules**

None

**6 Budget Consultation 2015/16** (Pages 7 - 32)

(Report of the Leader of the Council)

**7 Local Council Tax Reduction Scheme 2015/16** (Pages 33 - 58)

(Report of the Portfolio Holder for Operations and Assets)

- 8 Community Infrastructure Levy and Planning Obligations** (Pages 59 - 86)  
(Report of the Portfolio Holder for Economy and Education)
- 9 Southern Staffordshire Building Control Partnership Agreement Renewal**  
(Pages 87 - 94)  
(Report of the Portfolio Holder for Economy and Education)

Yours faithfully

A handwritten signature in black ink, appearing to read 'J. Wheatley', with a horizontal line underneath the name.

**pp Chief Executive**

*People who have a disability and who would like to attend the meeting should contact Democratic Services on 01827 709264 or e-mail [committees@tamworth.gov.uk](mailto:committees@tamworth.gov.uk) preferably 24 hours prior to the meeting. We can then endeavour to ensure that any particular requirements you may have are catered for.*

To Councillors: D Cook, R Pritchard, S Claymore, S Doyle, and M Thurgood.



## **MINUTES OF A MEETING OF THE CABINET HELD ON 11th SEPTEMBER 2014**

**PRESENT:** Councillor D Cook (Chair), Councillors S Claymore, S Doyle and M Thurgood

The following officers were present: Anthony E Goodwin (Chief Executive), John Wheatley (Executive Director Corporate Services), Andrew Barratt (Director - Assets and Environment), Stefan Garner (Director of Finance), Jane Hackett (Solicitor to the Council and Monitoring Officer), Robert Mitchell (Director - Communities, Planning and Partnerships), John Day (Corporate Performance Officer), Jane Eason (Communications and PR Manager), Neil Mason (Head of Community Leisure) and James Roberts (Economic Development and Enterprise Manager)

### **36 APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillor R Pritchard.

### **37 MINUTES OF THE PREVIOUS MEETING**

The minutes of the meeting held on 21<sup>st</sup> August 2014 were approved and signed as a correct record.

*(Moved by Councillor S Claymore and seconded by Councillor S Doyle)*

### **38 DECLARATIONS OF INTEREST**

There were no Declarations of Interest.

### **39 QUESTION TIME:**

#### **QUESTIONS FROM MEMBERS OF THE PUBLIC**

#### **NO.1**

**Under Schedule 4, 13, Mr Ravenscroft asked the Portfolio Holder for Economy and Education, Councillor S Claymore, the following question:-**

"Why was the lease to run the golf course given to Jack Barker Group some six years ago, given his record (available for everyone to see on the internet, just by

simply Googling Jack Barker) of what he had done to other courses in his group?"

**Councillor S Claymore gave the following reply:**

Mr Ravenscroft thank you for your question which, as you are now aware, has been answered on many occasions. However I will seek to clarify the situation one final time.

Following a major independent appraisal of all the Councils Leisure, sports and cultural services and assets (Leisure Futures) it was made clear to the Council that for the golf course to continue operating, it would require major annual revenue support and considerable capital investment. This came at a time when the Council had neither. The result being that the Council had difficult decisions to make.

In respect of the golf course, the recommended option from the report was to lease the course. The council undertook a robust procurement process that complied fully with all the legislative requirements placed on the public sector. That procurement process was supported by external specialists including Savills (experts in leasing and land values) and Cobetts who provided legal support and undertook due diligence checks. Having set a robust process the council duly followed that process and after checks were made appointed Jack Barker Golf to operate the course.

Please be aware that under the national tendering legislation which we must follow when allocating public funds or contracts, once the process starts the outcomes are set. Once it is complete the system will highlight a winner. You cannot then just decide one company was better because they took us out to lunch as can happen in the private sector, as stated, under the process the winner is the winner. This was a very robust piece of work, not a deal done over a pint down the local.

Therefore despite theories to the contrary the evidence shows that the decision to lease the course was made in the courses best interests and in good faith. The council took a number of references and visited successful courses operated by Jack Barker and at that time there was no concerns raised about the operator. The information you mention on google only came out after the contract was signed in 2006/07 when the economic downturn started.

The Council has previously accepted that the operator latterly known as Tamworth Golf Centre did not fully deliver on their business case and has outlined the measures taken to manage the lease and operating agreement. It should be noted that while the operator did make errors in judgment there was also a worldwide economic recession which impacted on the operators plans. We should also recognise that the operator did for the most part maintain his rental payments and therefore contributed to the delivery of other services whilst also keeping the golf course open at an affordable rate. It is in my view without the lease agreement the Council would have considered closing the course years ago.

**Supplementary Question:**

Thank you for your answer. There are so many things I could take up.

I believe you said that Jack Barker Group had no problems when the company came out on google in 2006/7 my point being if all golfers affected by decision could find information in five minutes on their computers, why did you give him the lease? If given and not checked out that, your due diligence was not checked on? Our conclusion is a lack of due diligence to select Jack Barker Group above other bidders knowing the situation he was in. Had the lease been given to an operator with proven track record we wouldn't have reached point of closure of this facility. The course was a credit to the town with over 500 members. The question has not been answered. But why was he offered the lease to run Tamworth Golf Course and leave it in the condition it is in today?

**Councillor S Claymore gave the following reply:**

I can't answer your question twice. If you're not accepting the answer I cannot answer. It was as true an answer as I could give.

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

None

The Leader of the Council changed the order of business to deal with agenda item 9 at item 6.

**41 OPERATIONAL AND FINANCIAL PERFORMANCE UPDATE TAMWORTH GOLF COURSE**

The Report of the Portfolio Holder for Economy and Education seeking to update Cabinet on the operational and financial performance of Tamworth Golf Course and to endorse the recommendation to close the course on the 1st of October 2014 was considered.

**RESOLVED:** That Cabinet endorsed:

1. the closure of Tamworth Golf Course on 1st of October 2014 and Cabinet authorised,
  - (i). the Director Communities Planning and Partnerships to make the appropriate arrangements for closing the service, and
  - (ii). the Director Assets & Environment make arrangements for the cessation of the current grounds management activities and to implement a minimal routine maintenance programme, and;
2. the annual green fee members are issued with a pro-rata refund.

*(Moved by Councillor S Claymore and Seconded by Councillor D Cook)*

#### **42 QUARTER ONE 2014/15 PERFORMANCE REPORT**

The Report of the Leader providing Cabinet with a performance health-check was considered.

**RESOLVED:** That Cabinet endorsed the contents of the report.

*(Moved by Councillor D Cook and seconded by Councillor S Claymore)*

#### **43 ANNUAL REPORT ON THE TREASURY MANAGEMENT SERVICE AND ACTUAL PRUDENTIAL INDICATORS 2013/14**

The Report of the Portfolio Holder for Operations and Assets seeking approval for the Annual Report on the Treasury Management Service and Actual Prudential Indicators 2013/14 was considered.

**RESOLVED:** That Cabinet:

1. approved the Actual 2013/14 Prudential Indicators within the report and shown at appendix 1, and;
2. accepted the Treasury Management stewardship report for 2013/14.

*(Moved by Councillor D Cook and seconded by Councillor M Thurgood)*

#### **44 CORPORATE RECORDS MANAGEMENT POLICY**

The Report of the Portfolio Holder for Operations and Assets seeking approval from Cabinet for the Corporate Records Management Policy was considered.

**RESOLVED:** That Cabinet endorsed and adopted the policy

*(Moved by Councillor D Cook and seconded by Councillor S Claymore)*

#### **45 BUSINESS AND ECONOMIC PARTNERSHIP (BEP) - STRATEGIC PLAN**

The Report of the Portfolio Holder for Economy and Education seeking Cabinet's endorsement of the revised Business and Economic Partnership's (BEP) Strategic Plan 2014 – 2018 was considered.

**RESOLVED:** That Cabinet endorsed:

1. the BEP Strategic Plan in terms of its overall vision, key themes, issues and priorities, and;
2. the next steps in developing the Action Plans based on each of the key themes of the Strategic Plan, which will now be formulated by the 'Theme Champions' and their support partners, who all sit on the BEP Board. This process will be facilitated by officers from the Shared Service and will involve further member consultation.

*(Moved by Councillor S Claymore and seconded by Councillor D Cook)*

## **EXCLUSION OF PRESS AND PUBLIC**

### **RESOLVED:**

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

## **46 AWARD OF THE DRY RECYCLING DISPOSAL CONTRACT FOR THE JOINT WASTE COLLECTION SERVICE**

The Report of the Portfolio Holder for Environment and Waste Management seeking approval to award the Dry Recycling Disposal Contract for the Joint Waste Collection Service to the contractor who submitted the most economically advantageous tender was considered.

**RESOLVED:** That Cabinet endorsed the recommendations as contained in the report.

*(Moved by Councillor M Thurgood and seconded by Councillor D Cook)*

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Leader

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THURSDAY, 23 OCTOBER 2014

**REPORT OF THE LEADER OF THE COUNCIL****BUDGET CONSULTATION 2015/16****EXEMPT INFORMATION**

There is no exempt information.

**PURPOSE**

To inform Cabinet of the outcomes arising from consultation undertaken with residents, businesses and the voluntary sector in accordance with the corporate budget setting process.

**RECOMMENDATION**

That Cabinet endorse the report and take account of the findings along with other sources of information when setting the 2015/16 Budget.

**EXECUTIVE SUMMARY**

Tamworth Borough Council's vision to 'aspire and prosper' and to be 'healthier and safer' is strongly endorsed by Tamworth's residents. This is evident in their views on 'what makes somewhere a good place to live' and 'what most needs improving to make Tamworth a better place to live'.

'Low levels of crime', 'a good health service' and 'good job prospects' were considered universally important by residents. All three of these factors have remained consistently important to Tamworth's residents in recent years. Despite progress, residents were clear that Tamworth would be a better place to live if improvements continued to be made to all three.

Businesses however had their own priorities and to enable them to flourish/expand and support Tamworth's vision, the majority of business respondents felt that a reduction in business rates and other charges would most assist their businesses and the wider economy.

Whilst support for the vision was clearly evident, the ways in which efforts should be focused can be understood more clearly by examining the priorities which sit beneath.

Working with businesses to create more employment opportunities locally was considered important by the majority. This was closely followed by creating opportunities for business growth and raising aspirations and attainment levels of young people. All of the priorities under 'aspire and prosper' were considered important by over half the respondents. Considered least important was 'branding and marketing Tamworth as a great place to live life to the full'.

Similar levels of support were expressed for the priorities under 'healthier and safer'. All of the priorities were supported by over half or more of respondents. However, the level of support was varied. Whilst over three quarters felt 'tackling crime and anti-social behaviour' was important, far fewer felt 'tackling alcohol abuse' was important.

Respondents were invited to indicate whether Tamworth Borough Council should spend more, the same or less on a wide range of key services. Respondents' views on spending varied greatly. Spending more on tackling anti-social behaviour and improving the economic, physical, social and environmental condition of Tamworth were supported by over half whilst spending more on events was supported by far fewer, just over one in ten would spend more on this.

Spending on refuse collection and recycling should remain the same or be increased. There was zero support for reduced spending on this service which is reflective of the importance of this universal, frontline service to Tamworth residents. There were services however where some support for reduced spending was apparent. This included spending less on housing advice and grants, and on grants for voluntary organisations and charities.

The consultation results reflected that there was a high level of support for increasing charges for leisure and other activities. Conversely residents clearly expressed their views on both town centre rentals and car parking, with decreased charges supported for both by two thirds or more respondents.

Whilst views were divided on an acceptable level of Council Tax increase, there was most support provided for the smallest rise offered. 38% supported a 0.6% rise.

#### **RESOURCE IMPLICATIONS**

There are no resource implications arising from this report.

#### **LEGAL/RISK IMPLICATIONS BACKGROUND**

It is a statutory duty to consult before the development of the budget. Budget consultation ensures our compliance with this.

#### **SUSTAINABILITY IMPLICATIONS**

There are no sustainability implications arising from this report.

#### **BACKGROUND INFORMATION**

As part of an annual process Tamworth Borough Council reviews its Council Tax and Charges strategy for the development of the budget. This process ensures that funding is put into areas of highest priority. An important element of this process is to understand the views of residents, businesses, and local voluntary groups on what these priorities are.

#### **REPORT AUTHOR**

John Day

#### **LIST OF BACKGROUND PAPERS**

None

#### **APPENDICES**

Budget consultation 2015/16 – Full report



 **tamworthlistens**  
your town ■ your life ■ your say

# Budget Consultation Report 2014

## For 2015/16 budget

### Summary Report

Produced by



**Staffordshire**  
County Council

On behalf of



## DOCUMENT DETAILS

This document has been produced on behalf of Tamworth Borough Council by the Staffordshire County Council Insight Team



Title	Budget Consultation Summary Report
Date created	September 2014
Description	The purpose of this document is to provide Tamworth Borough Council with the consultation results which illustrate how and where local residents feel that the budget should be spent.
Produced by	Alice Walters, Research Officer, Insight Team, Staffordshire County Council Tel: 01785 278150      email: <a href="mailto:alice.walters@staffordshire.gov.uk">alice.walters@staffordshire.gov.uk</a>
Additional contributions	Heather Collier, Research Coordinator Rhiannon West, Data Assistant
Geographical coverage	Tamworth Borough
Format	PDF and Publisher files
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## I. EXECUTIVE SUMMARY

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Tamworth Borough Council's vision to 'aspire and prosper' and to be 'healthier and safer' are strongly endorsed by Tamworth's residents. This is evident in their views on 'what makes somewhere a good place to live' and 'what most needs improving to make Tamworth a better place to live'.

'Low levels of crime', 'a good health service' and 'good job prospects' were considered universally important by residents. All three of these factors have remained consistently important to Tamworth's residents in recent years. Despite progress, residents were clear that Tamworth would be a better place to live if improvements continued to be made to all three.

Businesses however had their own priorities and to enable them to flourish/expand and support Tamworth's vision, the majority of business respondents felt that a reduction in business rates and other charges would most assist their businesses and the wider economy.

Whilst support for the vision was clearly evident, the ways in which efforts should be focused can be understood more clearly by examining the priorities which sit beneath.

Working with businesses to create more employment opportunities locally was considered important by the majority. This was closely followed by creating opportunities for business growth and raising aspirations and attainment levels of young people. All of the priorities under 'aspire and prosper' were considered important by over half the respondents. Considered least important was 'branding and marketing Tamworth as a great place to live life to the full'.

Similar levels of support were expressed for the priorities under 'healthier and safer'. All of the priorities were supported by over half or more of respondents. However, the level of support was varied. Whilst over three quarters felt 'tackling crime and anti-social behaviour' was important, far fewer felt 'tackling alcohol abuse' was important.

Respondents were invited to indicate whether Tamworth Borough Council should spend more, the same or less on a wide range of key services. Respondents views on spending varied greatly. Spending more on tackling anti-social behaviour and improving the economic, physical, social and environmental condition of Tamworth were supported by over half whilst spending more on events was supported by far fewer, just over one in ten would spend more on this.

Spending on refuse collection and recycling should remain the same or be increased. There was zero support for reduced spending on this services which is reflective of the importance of this universal, frontline service to Tamworth residents. There were services however where some support for reduced spending was apparent. This included spending less on housing advice and grants, and on grants for voluntary organisations and charities.

The consultation results reflected that there was a high level of support for increasing charges for leisure and other activities. Conversely residents clearly expressed their views on both town centre rentals and car parking, with decreased charges supported for both by two thirds or more respondents.

Whilst views were divided on an acceptable level of Council Tax increase, there was most support provided for the smallest rise offered. 38% supported a 0.6% rise and this is reflective of the average increase expected in Council's according to a survey by the Chartered Institute of Public Finance and Accountancy (CIPFA).

## 2. INTRODUCTION AND METHODOLOGY

Tamworth Borough Council reviews its Council Tax and charges on an annual basis and this helps to develop the Council's budget and ensures funding is put into areas which are of priority. Residents, businesses and the voluntary sector are an important part of this process and all were invited to share their views on priorities for the year ahead and different options for the budget before decisions are made on how to proceed.

The consultation for the 2015/16 budget ran from 1st August 2014 to 15th September 2014 and residents, businesses and the voluntary sector were encouraged to share their views through tailored online surveys.

A total of 198 responses to the consultation were received and consisted of:

- 183 residents
- 14 businesses; 7 based on an industrial estate, 4 in a town centre location, 2 in a local neighbourhood and 1 based at an out of town location
- 1 voluntary service organisation

This report presents the analysis of the combined results and emphasises where there are differences in opinions between the different respondent groups. Comparisons with the results of the consultation from last year have been made in order to identify any trends. In most cases, opinions remain consistent with those recorded last year and therefore only exceptions to this will be highlighted throughout the report.

## 3.1 RESULTS - VIEWS ON THE CORPORATE PRIORITIES

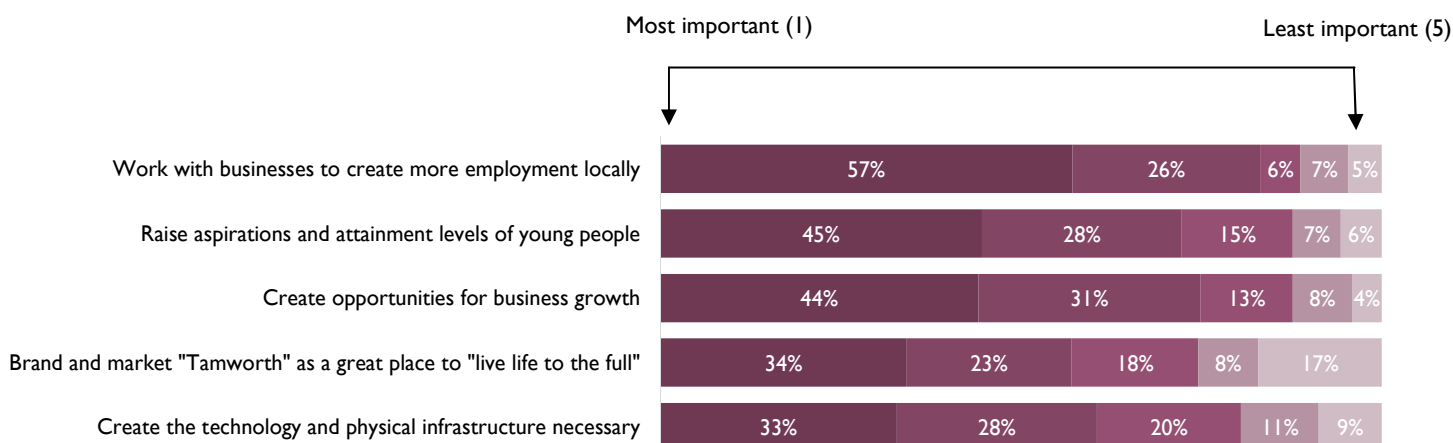
The Council vision is "One Tamworth, Perfectly Placed" and focus is to be placed upon working with partners to:

**Aspire and prosper in Tamworth** – to create and sustain a thriving local economy and make Tamworth a more aspirational and competitive place to do business.

**Be healthier and safer in Tamworth** - to create a safe environment in which local people can reach their full potential and live longer, healthier lives

Respondents were asked a series of questions about the importance of these priorities to themselves and the businesses they were representing, the results to these questions are detailed in the following section.

**Please tell us how important our priorities under 'aspire and prosper' are to you/your business/organisation, with 1 being most important and 5 being the least important**



It is clear across the board that respondents felt that any action to create opportunities for business growth, increase employment opportunities and raise aspirations of young people in the area were considered the most important priority areas under 'aspire and prosper', this was reinforced by some of the additional comments:

- *“The emphasis must be on....increased availability of local job opportunities.”*
- *“It is important to grow and sustain businesses in the area helping to create local job opportunities.”*
- *“Our priority has to be youngsters to be groomed for responsible adulthood if possible.”*
- *“We must make our youngsters aim higher to ensure we have the right skills in the workforce.”*
- *“More job prospects and better wages for all age groups.”*

Some respondents noted that the priorities are inter-linking and to solve one would positively impact on another:

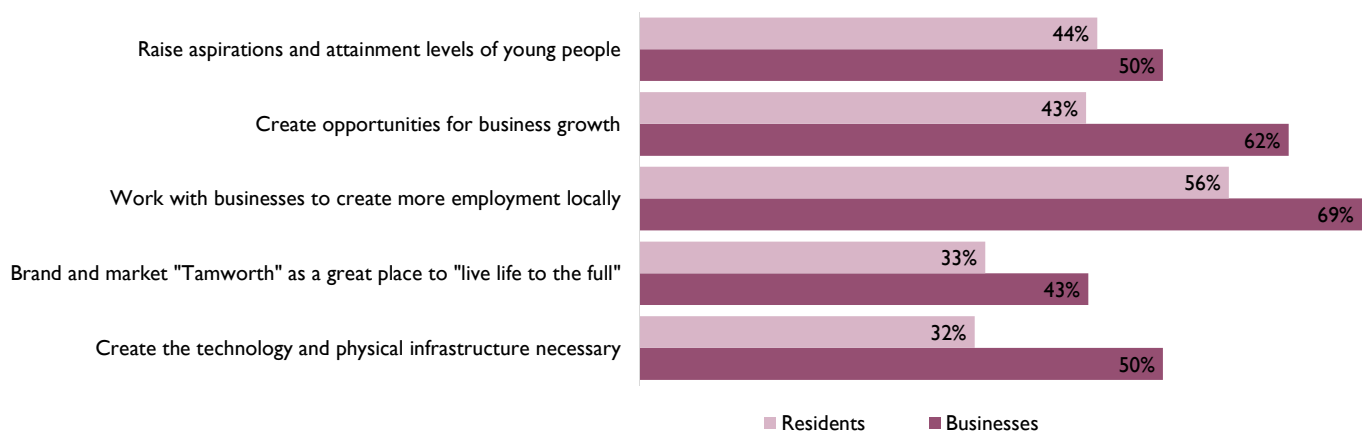
- *“Full employment can remove many social ills so prioritising business/employment solves many wider problems.”*
- *“If the aspiration and attainment levels are looked into, the youth crime and anti-social behaviour would (hopefully) be dealt with. I appreciate it will never be completely gone but I feel sure it would help.”*

While others highlighted that although they were supportive of what the Council is trying to achieve, there were several obstacles to overcome in order to succeed:

- *“No opportunities for businesses e.g. shops in the town centre being moved to Ventura Park and rental prices”.*
- *“Can't create a good infrastructure because of the poor rates of pay and people being able to afford it due to employment opportunities.”*

### Comparing results by respondent group

The graph below illustrates the breakdown of responses against each priority by respondent group type. Since there was just one respondent from a voluntary sector organisation, only the responses from businesses and residents have been compared. The results shown are the proportion of each group who felt that each of the priorities were of high importance to address.

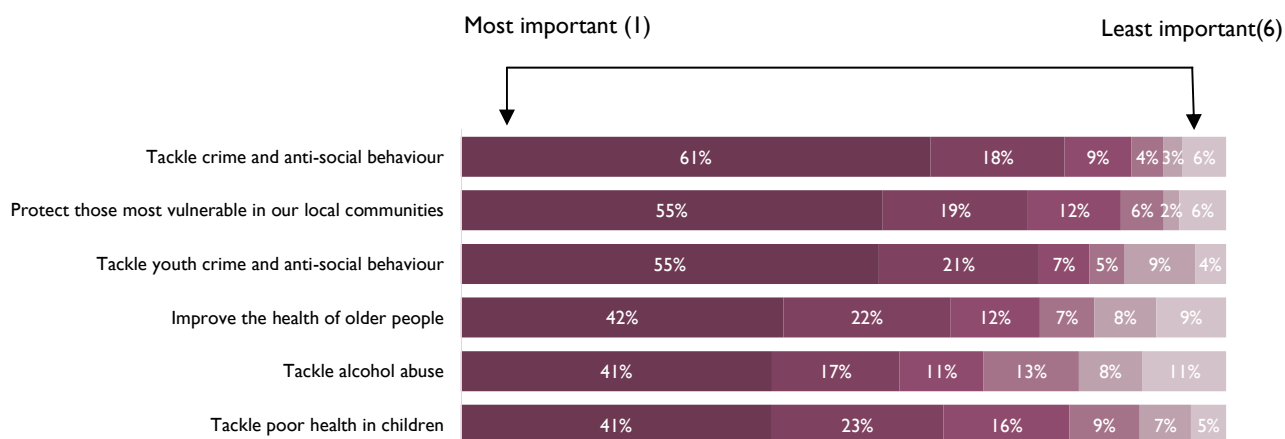


When drawing conclusions from this it is important to remember that the business respondent group is considerably smaller than the residents. However, it is quite clear that to businesses, creating the necessary technology and physical infrastructure is considered of greater importance than in the opinion of residents.

Aside from this, opinion is in concurrence and the top three priorities are mirrored across both groups.



**Please tell us how important our priorities under 'be healthy and safer in Tamworth' are to you/ your business/organisation, with 1 being most important and 6 being the least important**



\*combined results

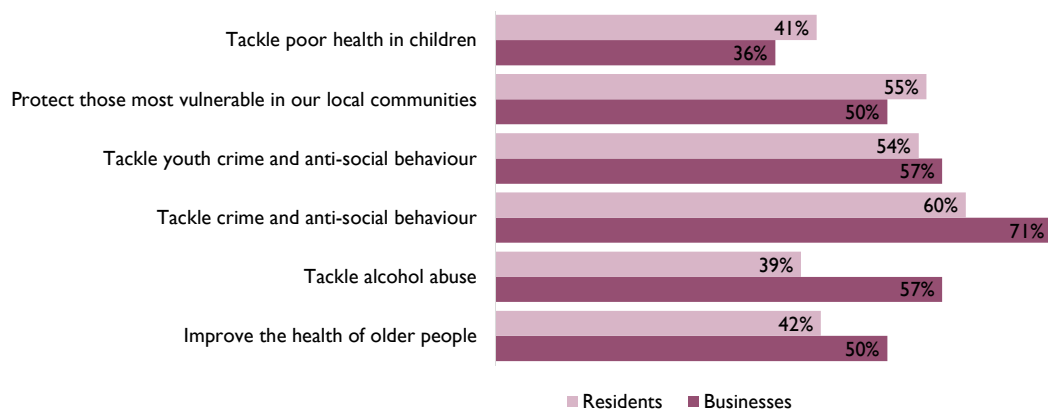
There are three clear priorities that resonate with the group as being of high importance and they focus on crime, anti-social behaviour and protecting vulnerable groups in the community:

- *“Priorities should be making Tamworth a safe place with low anti social behaviour.”*
- *“Support is limited in availability to people with disabilities and mental health problems.”*
- *“Tamworth is not a great place to live for older people, no where to go at night and be safe.”*
- *“Tamworth has an ageing population and the key to reducing acute demand especially where long term conditions exist is to ensure that they are supported to live independently in their own homes through joined up services that are the eyes and ears for each other and that they are enabled to make sensible and well informed choices.”*

Tackling health was highlighted a number of times within the additional comments and while respondents identified that there was a real need to tackle this issue many felt that this was not in the remit of the local council and the responsibility lay with “parents or the doctor”. However, several suggested that “poor health in children is often due to lack of education in their parents” and consequently action should be taken to “educate children with domestic science in schools and that may help improve children's health.”

**Breakdown of results by respondent group**

The graph below illustrates the breakdown of responses against each priority by respondent group type. Since there was just one respondent from a voluntary sector organisation, only the responses from businesses and residents have been compared. The results shown are the proportion of each group who felt that each of the priorities were of high importance to address.



Opinions across the two different groups was quite similar and tackling crime, anti-social and alcohol abuse (all of which are inter-linked) are important priorities along with protecting the vulnerable groups in society.

The general consensus was very much in support of both the vision and the priorities under them, “*your vision is what most people want in Tamworth*”. Respondents felt that achieving these priorities would be beneficial to the local community, “*I like it as Tamworth needs to become a nice place to live again*”. However, there were concerns how this could all be achieved, “*how we go about creating the vision is the problem. We need public/businesses/police & Council all to work together*”. One respondent felt that there were too many priorities to focus upon, “*you might be better advised to concentrate on achieving a few basic outcomes, rather than eleven*” and another felt that “*there are sections of society that do not want to live a decent life. No amount of money can change that. My priority would be improving work/life prospects for those who want to live in a decent community*”.

### **Revive the town centre and attract visitors to Tamworth**

An overwhelming theme from the additional comments from all respondents was that there needs to be a real focus on reviving the town centre and attracting visitors to Tamworth:

- “*There are some lovely areas in Tamworth, but the town centre is so depressing. Too many empty properties Castle grounds are good. Lower shop rents to attract independent retailers and hence more visitors.*”
- “*We must keep our Town attractive to visitors by fostering our Historic Heritage.*”
- “*Shops in the town being reopened to encourage people to visit Tamworth and as a result bring in more money.*”
- “*The town centre is unattractive to visitors - make more of the river and castle.*”
- “*Tamworth needs to attract more people to the town centre, it’s dying on it’s feet.*”
- “*Clean up the 'image' of Tamworth to the public. Make it more attractive to want to shop or visit in the town centre. It is rowdy and unattractive, especially during the evenings.*”

### **Make Tamworth safer**

Another theme raised in the comments from the group, which goes hand-in-hand with rebuilding the image of Tamworth is making it safer:

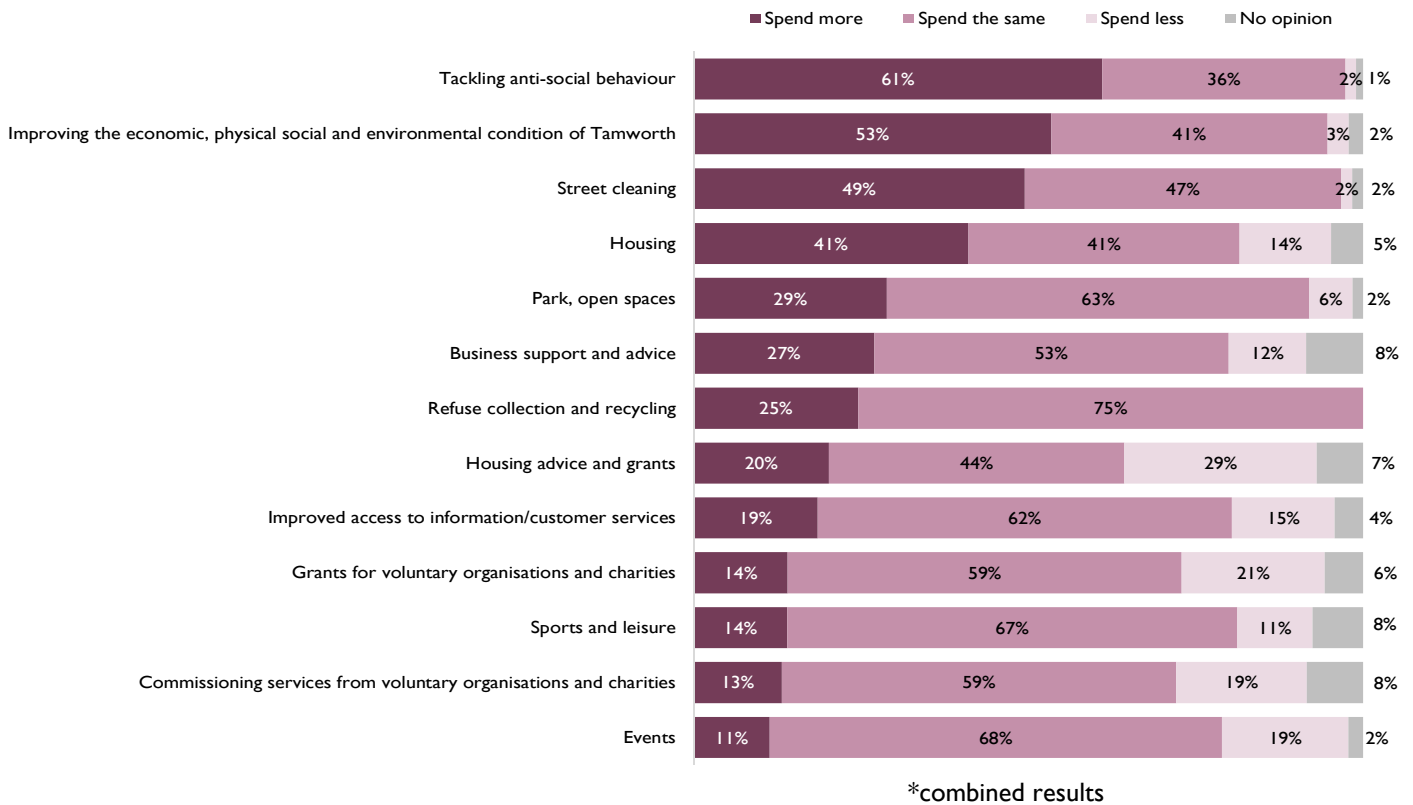
- “*There is too much talking and not enough action not enough actual policing.*”
- “*Let’s see more Police on the streets.*”
- “*Safer streets and more community spirit and social events.*”

### **Additional comments:**

- “*To achieve the vision get local services back.*”
- “*Tamworth Council is an enabler, not a doer. If the Council focuses on putting in place the infrastructure, tax regime and educational opportunities then our location and accessibility speaks for itself. The council should make more of our access to the transport network, London just over 1 hour away or 80% of the population within 1 hour of Tamworth (check the number but it must be high) then we can attract international investment as foreign companies look to set up in the UK. We must make our youngsters aim higher to ensure we have the right skills in the workforce.*”
- “*If attempting to carry out any of the above involves redundancies/loss of jobs of TBC employees then I am not in favour of any and certainly would not support TBC employers diminishing and private enterprise flourishing at their cost.*”
- “*I love this town, but I think it has a long way to go before being able to generate civic pride in people.*”
- “*There aren’t enough places for youngsters to go where they can be given the necessary information to better their lives.*”
- “*Provision of cheaper fitness classes/equipment for older people to improve their health including slimming classes - many can’t afford regular attendance which leads to overweight & health issues.*”
- “*Get kids in lesser areas, (Glascote Heath, Kerrig etc), to go to school. Train their parents in how to parent. Make sure they have breakfast before they go to school. That way, the next generation have a chance.*”

## 3.2 RESULTS - SPENDING ON SERVICES

Respondents were asked whether they felt the Council should increase, decrease or keep spending on major cost areas the same. Their collective responses are illustrated in the graph below:



### Maintain levels of spending

For the majority of cost areas, respondents felt that the level of spending should remain the same which echoes the sentiment from the responses received last year. Residents agreed that maintaining the levels of spending was particularly important in relation to refuse collection and recycling, sports and leisure and event. However, while businesses agreed that spending on refuse collection and recycling and events should remain the same, they also felt that street cleaning was an area of priority to maintain current levels of spending.

### Increase levels of spending

There are four cost areas where a high proportion of respondents would support increased spending; tackling anti-social behaviour, improving the economic, physical, social and environmental condition of Tamworth, street cleaning and housing. These are the same four areas identified in the responses from last year's consultation and clearly remain a priority for local residents and businesses.

Looking at the priorities by respondents group it is clear that businesses think that spending money to improve the economic, physical, social and environmental condition of Tamworth is a key priority. They consider money spent on other elements which compliment this such as business support and advice, parks and open space, sports and leisure and refuse collection and recycling are of higher priority than other cost areas. Residents, on the other hand, view cost areas such as street cleaning and housing as a greater priority.

## Reduce levels of spending

The four priority areas which respondents feel levels of spending should be reduced are housing grants and advice, grants for voluntary organisations and charities, commissioning services from voluntary organisations and charities and events. Both businesses and residents have the same view on these top priorities although businesses feel more strongly that spending should be reduced on improved access to information/customer services more so than grants for voluntary sector and charities.

## Which THREE services should the Council look at if they had to make savings or reduce costs?



\*combined results

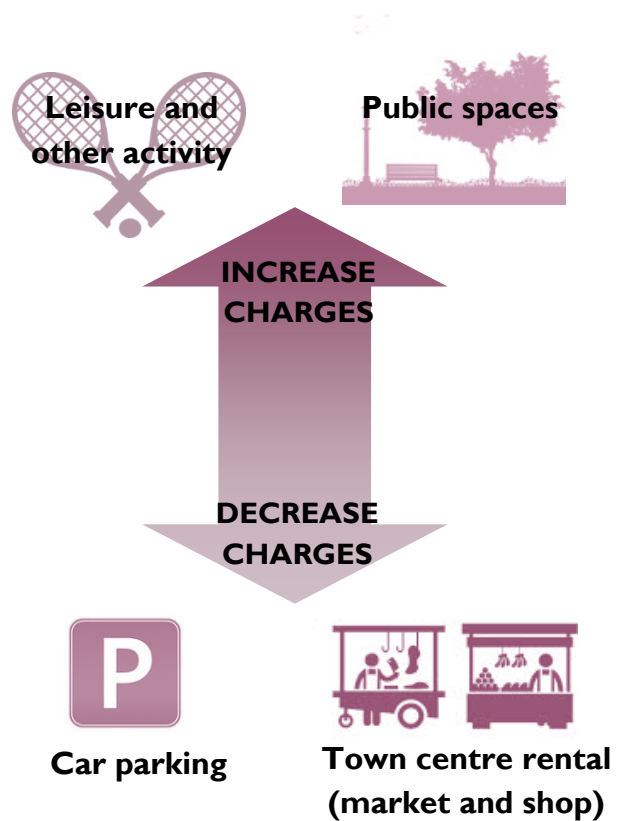
As the above graph shows, the respondents felt that the Council should focus reductions on three main areas; commissioning services from voluntary organisations and charities, events and grants for voluntary organisations and charities. While the first two service areas are the same as were selected last year, the latter has moved up the list from fourth to third.

**Which TWO of the below income areas do you think the Council could/should increase or decrease charges for?**

To emphasise once again the need to encourage more business into the town centre many respondents stressed the need to reduce town centre rental charges, “by decreasing rental on town properties it should bring better shops to the town, which means more people will visit and spend more money”.

Furthermore it was suggested that if parking charges are also reduced then more people will be encouraged into the town, not only to visit the new shops but also the wealth of history and beautiful open spaces Tamworth has to offer, “car parking needs to be reduced for town centre, too high for so little shopping”, “if the car parking fees were reduced, I feel sure more people would come into the town.”

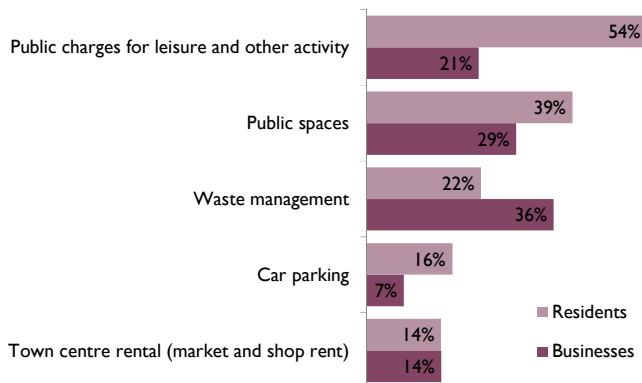
However, it was suggested that it might be beneficial to implement “a charge to park at Ventura, a nominal amount, would allow funds to be available to sort out the lack of parking”.



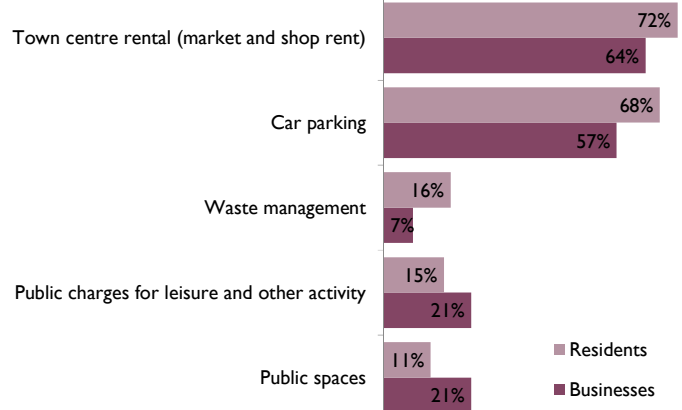
Breaking the responses down by respondent group highlights several differences when looking at the preferences for increasing charges with residents prioritising public charges for leisure activities while business felt that charges for waste management could be increased.

Both groups were in agreement with the top two priorities for decreasing charges however, with both stressing the continued point for the need for “investment into the town centre”.

**Increase charges**



**Decrease charges**



### 3.3 RESULTS - MAKING TAMWORTH A BETTER PLACE TO LIVE

The following questions were posed to the respondents who were participating in the consultation as a local resident.

#### What makes somewhere a good place to live and what needs to be improved in Tamworth?

The word cloud below depicts the answers selected by the group, the size of the font reflects the number of times that each element was selected. It is clear to see that low levels of crime, good job prospects and good health services continue to be considered as the three most important aspects of making somewhere a good place to live.



These aspects were the same three highlighted in last year's consultation and, as the word cloud below illustrates, all three of these key elements remain a priority in terms of areas where improvements are needed in Tamworth, alongside the provision of affordable, decent housing and clean streets.



Additional comments from respondents emphasised this, “if people are given affordable decent housing - good education and health services, plus good prospects, the rest will follow” and reiterated other key themes which have arose throughout the consultation analysis.

#### Better employment opportunities

Several respondents discussed their opinions towards the need to create better employment prospects and opportunities:

- “Jobs and education go far beyond what the Council could achieve, but increased apprenticeship provision would be an ideal.”
- “Jobs for school leavers who are not academic.”

#### Importance of localised services

Many respondents spoke of the necessity of having “local services back”, more specifically “a hospital worthy of its residents” “maternity unit, university, Magistrates Courts, Crown court and walk in health centres”.

#### Revive the town centre

Once again, respondents commented that the town centre was “virtually non-existent” and “could benefit from some attention”. It was agreed that there was a real need to “encourage shops into Tamworth town centre”, not only to

improve the look and feel of it since “large numbers of charity and cut price shops give a poor impression” but also to improve access to shops as retail parks are “not convenient for older people to get around easily.”

### **Market the town’s heritage, utilise the open spaces and encourage tourism**

Residents’ feel that through marketing campaigns, tourism levels can increase as there is a wealth of history in the town. Some expressed real passion that this had not been done previously to encourage local economy growth, “if the heritage of Tamworth had not been sold off and destroyed in previous decades then it would be thriving as Lichfield is. We need to trade upon Tamworth's historical past to bring people in through tourism”.

### **Additional comments**

Some further areas of improvement were identified in the additional comments including:

- “Better public toilets.”
- “Lower parking charges.”
- “More information on local events.”
- “More quality food and clothing shops in town, less phone and card shop.”
- “More exposed timber clad building.”
- “More leisure facilities at affordable prices for all ages.”
- “Focus on increasing the ambition and affluence of our population.... will drive our business growth and create a virtuous circle of tax and investment which will raise our perception/standing in the country.”

### **What would you consider to be an acceptable Council Tax increase for the 2015/16 budget?**

Option A (0.64%)	Option B (1.00%)	Option C (2.00%)	Option D (2.50%)
38%	35%	21%	6%

Whilst views were divided on an acceptable level of Council Tax increase, there was most support provided for the smallest rise offered. 38% supported a 0.6% rise and this is reflective of the average increase expected in Council’s according to a survey by the Chartered Institute of Public Finance and Accountancy (CIPFA).

### 3.4 RESULTS : MAKING TAMWORTH BETTER FOR BUSINESSES

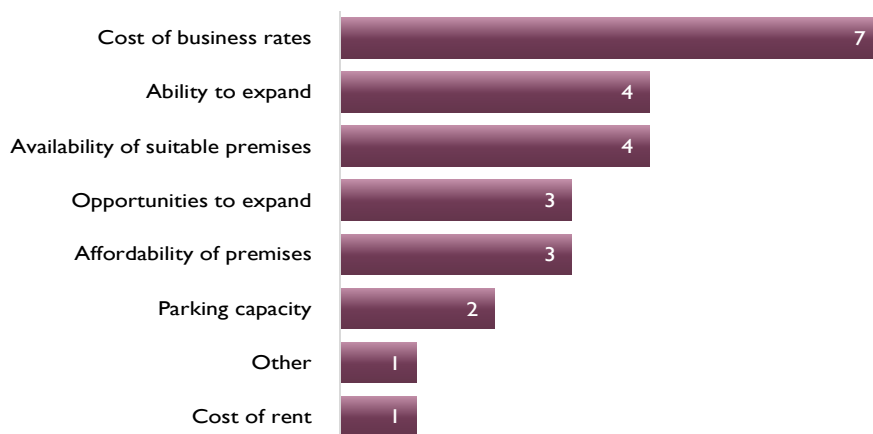
Respondents who completed the questionnaire from the perspective of a local business were asked to provide opinion and comments on a number of questions posed to gather a picture of how Tamworth can be made better for businesses. This section will explore these questions and the responses that were given. Since the number of respondents from businesses was so low (14), numbers as well as percentages have been used in the graphs in this section.

Almost half of the respondents stipulated that access to main road networks was one of the main reasons their company was based in Tamworth while almost a third cited proximity to customers. 11 of the businesses stipulated that their current premises were suitable for now and their likely future needs although 4 later stipulated that they were looking to relocate and a further 3 businesses intended to expand.

#### Barriers to business expansion

As identified in the vision and priorities, the Council is keen for local businesses to grow and therefore need to be aware of what barriers need to be broken down in order for this to happen.

Respondents were asked to identify what they believe to be the three main barriers from the list shown in the graph below. While it was requested that three options were selected, only 5 respondents did so with a further 2 respondents identifying 2 barriers and 6 selecting just one.



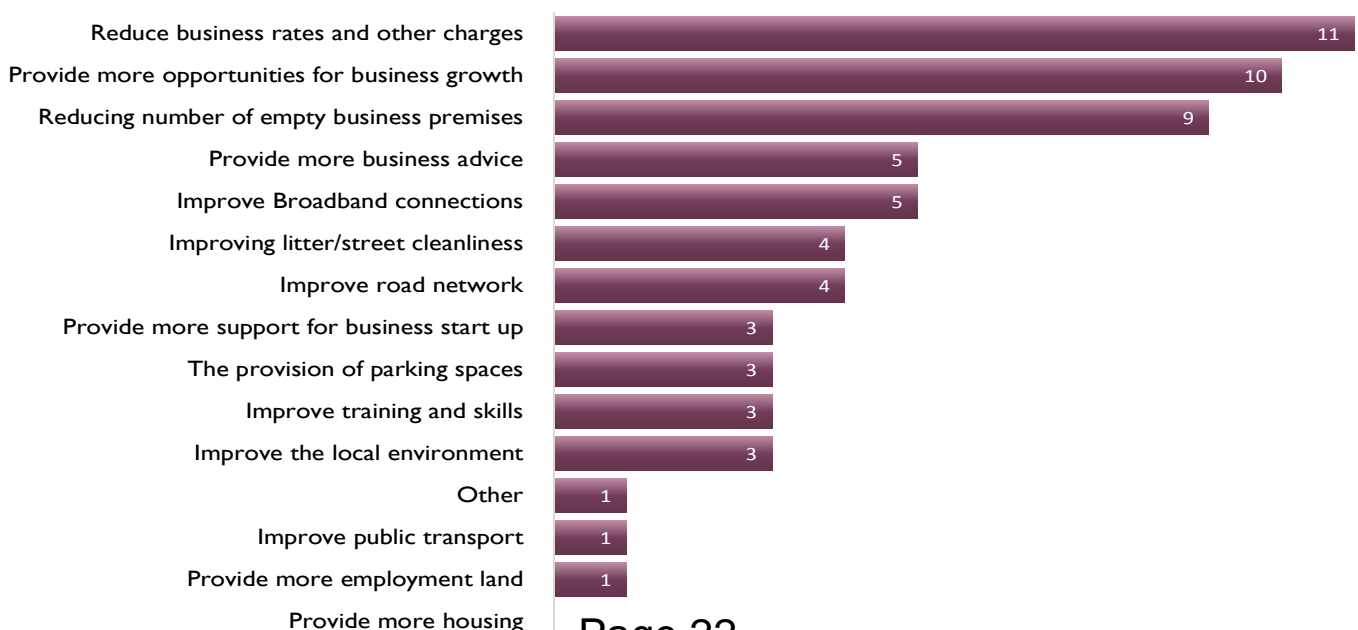
The cost of business rates was identified by half of all business respondents as the main barrier to business expansion with ability to expand and availability of suitable premises being identified as the next two most common barriers.

An additional barrier identified in the comments section echoed a theme raised in earlier questions regarding the “town centre decline/decay” which is

deemed as a barrier to business expansion since it’s current state is “not attractive for retail customers”.

A further comment identified the “availability of appropriately qualified staff” as another barrier to expansion.

#### How can Tamworth be improved to assist businesses and the economy?





### 3.5 RESULTS :ADDITIONAL COMMENTS

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#### Any other areas where you feel the Council could save money:

- **Introduce new charges** – “Charge nominal fee for pensioners bus passes yearly”, “Charge small fee for mobility scooters to ride on footpaths”, “Disabled parking should be charged. They get their designated parking, but why does it have to be free?”
- **Reduce the number of Councillors** – “We are over represented by Councillors who appear to be more interested in getting selected than carrying out useful work, reduce each ward to 2 Councillors with one as a combined Borough and County representative.”
- **Reduce/freeze expenses payments and local council staff wages** – “Look at the salaries of staff and Members' Allowances”, “some expenses for top management positions in the council should be reduced or frozen. In line with other tax payers who live and work in Tamworth and local areas.”
- **Reassess staffing levels** - “Office staff cull! Vastly overstaffed with little or no management of staffing levels with controlled job volumes / objectives for each employee. Need to look at each & every position and can each be justified, honestly?”
- **Flowers and park services**- “Spend less on flowers”, “stop mowing vast areas of grass & let the wild flowers grow. Just mow paths through”, “the town is awash with flowers and displays, which, whilst visually pleasing, is not bringing visitors to the town centre.”

## APPENDIX I: RESIDENTS RESPONDENT PROFILE

### Are you male or female?

	Survey responses		Tamworth MYE 2013
	No's	%	%
Female	92	52%	51%
Male	84	47%	49%

### What is your age?

	Survey responses		Tamworth MYE 2013
	No's	%	%
18-24	3	2%	10%
25-34	7	4%	17%
35-44	14	8%	18%
45-54	30	17%	18%
55-64	38	21%	16%
65-74	62	35%	13%
75+	18	10%	8%
	5	3%	

### What is your ethnicity?

	Survey responses		Tamworth 2011 Census comparison
	No's	%	%
Asian/Asian	0	0%	0.8%
British/Indian/ Pakistani/ Bangladeshi	0	0%	0.51%
Black or Black British	0	0%	0.2%
Chinese	1	1%	1.0%
Mixed Heritage	167	95%	95%
White Other	3	2%	2.3%
Prefer not to say	4	2%	N/A
Other	1	1%	0.1%

### Do you consider yourself to have a disability?

	Survey responses		Tamworth 2011 Census comparison
	No's	%	%
Yes	57	33%	18%
No	115	66%	82%
Prefer not to say	2	1%	N/A

### What type of disability do you have?

	Survey responses	
	No's	%
Communications	1	2%
Hearing	6	11%
Learning	1	2%
Mental Health	2	4%
Mobility	27	48%
Physical	11	20%
Visual	2	4%
Other	6	11%

## APPENDIX I I: RESIDENTS TABLES OF RESULTS

Please tell us how important our priorities under 'aspire and prosper in Tamworth' are to you, with 1 being the most important and 5 being the least important.

Survey responses					
	1	2	3	4	5
Raise aspiration and attainment levels of young people.	44.4%	27.2%	15.6%	7.2%	5.6%
Create opportunities for business growth	43.1%	32.6%	11.6%	8.3%	4.4%
Work with businesses to create more employment locally	56.6%	26.4%	4.9%	7.1%	4.9%
Brand and market "Tamworth" as a great place to "live life to the full".	33.1%	23.0%	18.0%	9.0%	16.9%
Create the technology and physical infrastructure necessary	31.7%	28.3%	20.6%	11.1%	8.3%

Please tell us how important our priorities under 'be healthier and safer in Tamworth' are to you, with 1 being the most important and 6 being the least important.

Survey responses						
	1	2	3	4	5	6
Tackle poor health in children	41.1%	22.2%	16.7%	8.3%	7.2%	4.4%
Improve the health of older people	41.8%	23.1%	11.5%	6.6%	8.2%	8.8%
Tackle alcohol abuse	39.0%	16.9%	11.3%	13.0%	8.5%	11.3%
Tackle crime and anti-social behaviour	60.3%	19.0%	8.4%	3.9%	2.8%	5.6%
Tackle youth crime and anti-social behaviour.	54.1%	21.5%	6.6%	4.4%	9.9%	3.3%
Protect those most vulnerable in our local communities	55.2%	19.9%	11.6%	5.0%	2.2%	6.1%

Please select FIVE things from the list below that you believe are the most important for making somewhere a good place to live.

Survey responses			
Low levels of crime	85.2%	Affordable decent housing	50.3%
Good health services	71.6%	Good parks and open spaces	46.4%
Clean streets	50.3%	Good sports and leisure facilities	15.8%
Good education provision	49.7%	Good job prospects	71.6%
Good shopping facilities	42.6%	Community events	12.6%

Please tick FIVE things you feel need to improve most to make Tamworth a better place to live

Survey responses			
Level of crime	70.5%	Affordable decent housing	57.9%
Health service	57.4%	Parks and open spaces	30.6%
Cleanliness of streets	55.7%	Community events	17.5%
Education provision	36.1%	Sports and leisure facilities	21.9%
Shopping facilities	47.5%	Job prospects	79.8%

For the following services, do you think we should spend more, the same or less?

Survey responses				
	More	Same	Less	No opinion
Sports and Leisure	12.2%	68.0%	12.2%	7.6%
Events	11.2%	67.6%	18.8%	2.4%
Refuse collection and recycling	23.8%	76.2%	0.0%	0.0%
Parks and open spaces	28.5%	63.4%	6.4%	1.7%
Street cleaning	52.0%	45.0%	1.2%	1.8%
Tackling anti-social behaviour	62.3%	34.9%	1.7%	1.1%
Improving the economic, physical, social and environmental condition of Tamworth	51.4%	42.9%	3.4%	2.3%
Grants for voluntary organisations and charities	13.5%	59.0%	22.5%	5.1%
Commissioning services from voluntary organisations and charities	12.5%	59.7%	19.9%	8.0%
Housing	42.0%	39.8%	14.8%	3.4%
Housing Advice and Grants	20.7%	43.7%	29.9%	5.7%
Improved access to information/customer services	18.1%	62.7%	15.3%	4.0%
Business support and advice	25.3%	53.4%	12.6%	8.6%

From the services listed below, if the Council had to make savings or reduce costs, which services do you think we should look at. Please select THREE.

Survey responses			
Sports and leisure	24.0%	Voluntary sector grants	37.2%
Events	37.7%	Voluntary sector commissioning	38.8%
Refuse collection and recycling	4.9%	Housing	11.5%
Parks, open spaces	7.7%	Housing advice and grants	28.4%
Street cleaning	3.3%	Improved access to information/customer services	32.8%
Tackling anti-social behaviour	2.0%	Business support and advice	34.4%
Improving the economic, physical, social and environmental condition of Tamworth	14.2%		

Which TWO of the below income areas do you think the Council could/should increase?

	Survey responses
Car parking	16.4%
Public charges for leisure and other activity	53.6%
Waste management	21.9%
Public spaces	39.3%
Town centre rental (market and shop rent)	14.2%

Which TWO of the below income areas do you think the Council could/should decrease charges ?

	Survey responses
Car parking	67.8%
Public charges for leisure and other activity	14.8%
Waste management	16.4%
Public spaces	11.5%
Town centre rental (market and shop rent)	72.1%

What would you consider to be an acceptable Council Tax increase for the 2015/2016 budget?

	Survey responses
Option A (0.64%)	38.1%
Option B (1.00%)	35.5%
Option C (2.00%)	20.6%
Option D (2.50%)	5.8%

## APPENDIX III: BUSINESS TABLES OF RESULTS

Which of the following best describes your business location?

Survey responses			
Town centre location	28.6%	Out of town shopping park	0.0%
Out of town location	7.1%	A local neighbourhood area	14.3%
Industrial estate	50.0%	Based at home	0.0%

What is the status of your company at this location?

Survey responses			
Independent with no other branches	57.1%	Public sector organisation	7.1%
Head office	7.1%	Other	14.3%
Branch or subsidiary of a larger group	14.3%		

What are the main reasons why your company is based here?

Survey responses			
Availability of suitable workforce	14.3%	Cost of the site/premises	21.4%
Nature of local economy	21.4%	Availibility of local facilities	7.1%
Proximity of suppliers	7.1%	Access to main road network	42.9%
Proximity to customers	28.6%	Availability of Broadband	0.0%
Quality of the environment	0.0%	Other	14.3%
Nature of the site/premises	21.4%		

Are the premises suitable for your current or likely future needs?

Survey responses	
Yes	64.3%
No	35.7%

What are your company's intentions with regard to this location?

Survey responses			
Expand	21.4%	Stay the same	64.3%
Contract	0.0%	Relocate	28.6%

In your opinion, what are the barriers to business expansion? (Please select three)

Survey responses			
Cost of business rates	50.0%	Cost of rent	7.1%
Affordability of premises	21.4%	Ability to expand	28.6%
Parking capacity	14.3%	Opportunities to expand	21.4%
Availability of suitable premises	28.6%	Other	7.1%

How can Tamworth be improved to assist businesses and the economy? We need your top five priorities from the examples given below, or if not listed tell us what they are by completing 'other'?

Survey responses			
Provide more employment land	7.1%	Improve training and skills	21.4%
Provide more housing	0.0%	The provision of parking spaces	21.4%
Improve road network	28.6%	Reducing number of empty business premises	64.3%
Improve public transport	7.1%	Improving litter/street cleanliness	28.6%
Improve the local environment	21.4%	Provide more support for business start up	21.4%
Improve Broadband connections	35.7%	Provide more opportunities for business growth	71.4%
Reduce business rates and other charges	78.6%	Other	7.1%
Provide more business advice	35.7%		

Please tell us how important our priorities under 'aspire and prosper in Tamworth' are to you, with 1 being the most important and 5 being the least important.

Survey responses					
	1	2	3	4	5
Raise aspiration and attainment levels of young people.	50.0%	28.6%	14.3%	0.0%	7.1%
Create opportunities for business growth	61.5%	7.7%	23.1%	7.7%	0.0%
Work with businesses to create more employment locally	69.2%	15.4%	15.4%	0.0%	0.0%
Brand and market "Tamworth" as a great place to "live life to the full".	42.9%	21.4%	14.3%	0.0%	21.4%
Create the technology and physical infrastructure necessary	50.0%	14.3%	14.3%	7.1%	14.3%

Please tell us how important our priorities under 'be healthier and safer in Tamworth' are to you, with 1 being the most important and 6 being the least important.

Survey responses						
	1	2	3	4	5	6
Tackle poor health in children	35.7%	21.4%	14.3%	21.4%	0.0%	7.1%
Improve the health of older people	50.0%	0.0%	14.3%	14.3%	7.1%	14.3%
Tackle alcohol abuse	57.1%	14.3%	7.1%	7.1%	7.1%	7.1%
Tackle crime and anti-social behaviour	71.4%	0.0%	14.3%	7.1%	0.0%	7.1%
Tackle youth crime and anti-social behaviour.	57.1%	14.3%	7.1%	7.1%	0.0%	14.3%
Protect those most vulnerable in our local communities	50.0%	7.1%	14.3%	14.3%	0.0%	7.1%

For the following services, do you think we should spend more, the same or less?

Survey responses				
	More	Same	Less	No opinion
Sports and Leisure	38.5%	53.8%	0.0%	7.7%
Events	14.3%	64.3%	21.4%	0.0%
Refuse collection and recycling	35.7%	64.3%	0.0%	0.0%
Parks and open spaces	35.7%	57.1%	7.1%	0.0%
Street cleaning	21.4%	71.4%	7.1%	0.0%
Tackling anti-social behaviour	50.0%	50.0%	0.0%	0.0%
Improving the economic, physical, social and environmental condition of Tamworth	84.6%	15.4%	0.0%	0.0%
Grants for voluntary organisations and charities	23.1%	53.8%	7.7%	15.4%
Commissioning services from voluntary organisations and charities	23.1%	46.2%	15.4%	15.4%
Housing	23.1%	53.8%	0.0%	23.1%
Housing Advice and Grants	7.7%	53.8%	15.4%	23.1%
Improved access to information/customer services	27.3%	45.5%	18.2%	9.1%
Business support and advice	50.0%	42.9%	0.0%	7.1%

From the services listed below, if the Council had to make savings or reduce costs, which services do you think we should look at. Please select THREE.

Survey responses			
Sports and leisure	0.0%	Voluntary sector grants	35.7%
Events	35.7%	Voluntary sector commissioning	50.0%
Refuse collection and recycling	0.0%	Housing	7.1%
Parks, open spaces	14.3%	Housing advice and grants	50.0%
Street cleaning	14.3%	Improved access to information/customer services	35.7%
Tackling anti-social behaviour	0.0%	Business support and advice	28.6%
Improving the economic, physical, social and environmental condition of Tamworth	7.1%		



Which TWO of the below income areas do you think the Council could/should increase?

	<b>Survey responses</b>
Car parking	7.1%
Public charges for leisure and other activity	21.4%
Waste management	35.7%
Public spaces	28.6%
Town centre rental (market and shop rent)	14.3%

Which TWO of the below income areas do you think the Council could/should decrease charges ?

	<b>Survey responses</b>
Car parking	57.1%
Public charges for leisure and other activity	21.4%
Waste management	7.1%
Public spaces	21.4%
Town centre rental (market and shop rent)	64.3%

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THURSDAY, 23 OCTOBER 2014

**REPORT OF THE PORTFOLIO HOLDER FOR OPERATIONS AND ASSETS****LOCAL COUNCIL TAX REDUCTION SCHEME FROM 2015/16****EXEMPT INFORMATION**

This proposal is not exempt information for the purposes of Part 1 of Schedule 12 (A) to the Local Government Act 1972

**PURPOSE**

To advise Members of the results and feedback from the recently undertaken consultation on and the financial implications of the 2013/14 scheme. To review the consultation feedback when considering potential changes to the scheme to be applied in the 2015/16 Local Council Tax Reduction Scheme;

To advise Members that The Local Council Tax Reduction Scheme for Working Age Customers for 2015/16 should include an uprating to Applicable Amounts (to be applied for 2015/16);

That Members endorse the proposed change to be incorporated within the draft proposed scheme to be reported to full Council on 16<sup>th</sup> December 2014.

**RECOMMENDATIONS**

- 1) That Cabinet consider the results of the public consultation on the current scheme, carried out 15 July to 15 September 2014, and endorse or otherwise the proposed recommended change detailed below when the scheme is considered by Council on the 16th December 2014;**
- 2) The base scheme (in place for 2013/14 & 2014/15) goes forward with the following exception / amendment:  
that The Local Council Tax Reduction Scheme for Working Age Customers for 2015/16 will include an uprating to Applicable Amounts in line with Housing Benefit (estimated 1% to be applied for 2015/16);**
- 3) Following the outturn results for 2014/15 (together with grant projections) the impact on the scheme be reviewed and reported to Members prior to consultation for the development of the 2016/17 scheme.**
- 4) The exclusion of child maintenance as income be included as a specific item in the consultation for the 2016/17 scheme.**

## EXECUTIVE SUMMARY

This report details the key issues arising from the Local Council Tax Reduction Scheme.

The Welfare Reform Act abolished Council Tax Benefit from 1 April 2013. It was replaced by a new Local Council Tax Reduction Scheme for working age customers. A national scheme of regulations was introduced for pensioners, which mirrors the Council Tax Benefit Scheme.

Grant funding was reduced and is distributed by the Department for Communities and Local Government rather than the Department for Work and Pensions.

Alignment of the scheme with applicable amounts for the Housing Benefit scheme (currently indicated at 1% by DWP) should be considered. This is not a legislative requirement for those of working age, but a decision for this Council. The financial impact of this is not likely to be material as the increase in applicable amounts will be offset by increased income and state benefits received. This will also prevent confusion between schemes and reduce administrative burdens. Furthermore, it reflects cost of living rises allowed by the Government.

The Council meeting on 17<sup>th</sup> December 2013 (minute number 47 refers), resolved that:

*The scheme following completion of the first year be reviewed and identification of delivery of the scheme's financial target and full implications of potential changes that may arise re consultation/equalities/potential challenge.*

In compliance with the above, a web based consultation exercise was carried out between 15 July to 15 September 2014 – the results are attached at **Appendix 1**. Local Community Groups were notified of the consultation and a press release also encouraged consultation responses.

There was a low response rate and no material issues were identified.

The inclusion of child maintenance as income has previously been raised by Members. It should be noted that 77% of respondents indicated they feel it is reasonable to continue to include child maintenance as income in determining an award, confirming that it continues to be a supported policy by those respondents.

Should Cabinet propose to exclude maintenance as income for 2015/16, the public must be consulted again as it is deemed a material change. Given the deadline of 31st January 2015 for the 2015/16 scheme to be agreed at full Council, it is recognised that there is no scope for further, timely consultation prior to full Council on 16<sup>th</sup> December 2014. It is proposed that the exclusion of maintenance as income be a specific consultation item in the forthcoming 2016 / 17 review and consultation process..

## OPTIONS CONSIDERED

The current scheme for most working age customers bases an award on a maximum of 75% of their Council Tax liability. Those who receive a Severe Disability Premium, or who have a disabled child and those who receive War Widows/War Disability Pension or Armed Forces Compensation Scheme payments have their awards calculated on 100% of their liability.

Pensioners also continue, under The Council Tax Reduction Schemes (Prescribed Requirements) (England) Regulations 2012, to have their awards based on 100% of their Council Tax liability.

A two month public consultation on the current scheme was held between 15 July and 15 September 2014. Although the consultation was widely publicised, only 77 responses were received.

There was a high level of endorsement for four out of the ten policies and the details of these are outlined below:

- Level of support for pensioners, severely disabled and in receipt of a Severe Disability Premium, claimants with disabled children and claimants receiving a War Disablement or War Widows Pension or Armed Forces Compensation Scheme payments;
- Protecting working age claimants who attract a Severe Disability Premium;
- ***Including maintenance payments as income;***
- Working age claimants who are not protected should pay at least 25% of their Council Tax bill.

Furthermore, five out of the ten policies received a 'moderate' level of support with between 50-74% agreeing that they were reasonable. They are;

- Council Tax Reduction is limited to a maximum of 75% of a Band D property for working age claimants;
- The ongoing removal of Second Adult Rebate for working age claimants
- Childcare costs are included as an outgoing and subtracted from a claimant's overall net income;
- Child Benefit is not taken into account as income;
- Non dependant charges of £5 if the non dependant does not work and £10 if the non dependant is employed.

One received 'some' support. This was Policy 6 under which claimants were able to protect £16,000 in savings and still receive a means tested reduction of their Council Tax bill.

## RESOURCE IMPLICATIONS

Council Tax Benefit subsidy awarded for 2012/13 was £5.38m. The current scheme was modelled on delivering an estimated benefit reduction in the region of £700k for 2013/14, necessitated by grant cuts of 10% and protection for Pensioners and other vulnerable groups. The final amount awarded for 2013/14 was £4.47m – equating to a surplus of c.£21k for the Council (10.9% of extrapolated Collection Fund Surplus circa. £189k).

	2012/13 Estimate £'000	2013/14 Actual £'000	Variance £'000	2014/15 to date £'000	2015/16 Estimated £'000
Council Tax Benefit	5,404				
Estimated Scheme Cost	4,685	4,470	(215)	4,300	4,300
Estimated Saving (including Protection)	719				
Cost to TBC (10.9%)	511	487		469	469
TBC Grant rec'd *	516	508		439	371
Variance (Surplus) / Deficit	(5)	(21)		29	98
Extrapolation for Collection Fund	(48)	(189)		270	896
* includes SFA Grant Reduction				13.5%	15.5%

Latest figures confirm that £4.3m has so far been awarded in Local Council Tax Reduction (LCTR) for 2014/15, to both working age and pensioner customers. The live working age caseload has reduced by approximately 10% since April 2013, which is attributable to customers finding employment and becoming financially self sufficient and contributes to the lesser amount now awarded.

Within the limitations of the system, a detailed analysis of the outstanding arrears relating to LCTR scheme claimants has been carried out (where they can be identified). We can attribute £230k of arrears as at 31 March 2014 to the LCTR scheme claimants, though that arrears figure has dropped by almost a quarter over the last six months.

An “in year” collection rate of 74.8% for 2013/14 compares to 97.6% overall and a collection rate of 81.1% as at 30th September 2014 compares to the 98.3% overall collection for 13/14. This means the outstanding LCTR scheme balances have reduced by 25% so far this year, while the overall arrears have reduced by 30%. £175k of the new LCTR scheme arrears are still outstanding at 30 September 2014.

For 2014/15, the Settlement Funding Assessment (SFA) has been reduced by 13.5%. Due to the overall reduction in SFA, it is currently forecast that the scheme will cost the Council £29k in 2014/15 (with a projected cost of £98k in 2015/16).

Risks around the estimate for 2015/16 include:

- Final Settlement Funding Assessment confirmation is not expected until January 2015 (provisional figures in December 2014);
- The final cost is dependent on collection levels – the estimated figures are based on the amounts chargeable (with arrears still to be collected);
- The scheme has now been running for 18 months. Current expenditure as above may or may not increase as the scheme is demand led and depends on local social and economic factors.

## **LEGAL/RISK IMPLICATIONS BACKGROUND**

The Department for Communities and Local Government have confirmed that consultation on the scheme is not required annually if it is not amended. However, consultation was made this year to gauge fresh views on the policy, given that it has now been in operation for 18 months.

Appendix 1 confirms the public consultation results, gauging views on each of the current policy elements of the scheme.

Section 13 A(2) and Schedule 1A of the Local Government Finance Act 1992 as well as Schedule 1A, paragraph 16 of the Local Government Finance Act 2012 legislate that the scheme must be agreed annually by full Council.

Full Equality Impact Assessments were considered and taken into account when the scheme was initially finalised and agreed.

## **SUSTAINABILITY IMPLICATIONS**

Funding for the replacement of the previous Council Tax Benefit scheme was changed from AMEY (unrestricted reimbursement of Council Tax Benefit subsidy) to DEL (restricted, pre allocated grant figure). The Council must be aware that there must continue to be a contingency if, for instance, a major local employer goes into administration.

## **BACKGROUND INFORMATION**

The Welfare Reform Act 2012

[http://www.legislation.gov.uk/ukpga/2012/5/pdfs/ukpga\\_20120005\\_en.pdf](http://www.legislation.gov.uk/ukpga/2012/5/pdfs/ukpga_20120005_en.pdf)

The Council Tax Reduction Schemes (Prescribed Requirements) (England) (Regulations)

2012

[http://www.legislation.gov.uk/uksi/2012/2885/pdfs/uksi\\_20122885\\_en.pdf](http://www.legislation.gov.uk/uksi/2012/2885/pdfs/uksi_20122885_en.pdf)

## REPORT AUTHOR

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## LIST OF BACKGROUND PAPERS

Local Council Tax Reduction Scheme 2013/14 Report, presented to Council on 13<sup>th</sup>  
December 2012 <http://democracy.tamworth.gov.uk/mglIssueHistoryHome.aspx?IId=2548>

Local Council Tax Reduction Scheme 2014/15 Report, presented to Council on 17<sup>th</sup>  
December 2013 <http://democracy.tamworth.gov.uk/mglIssueHistoryHome.aspx?IId=3849>

## APPENDICES

Local Council Tax Reduction Scheme Consultation Summary Report 2014	<b>Appendix 1</b>
Council Tax Reduction caseload summary	<b>Appendix 2</b>
Council Tax Reduction expenditure summary	<b>Appendix 3</b>





# Local Council Tax Reduction Scheme Consultation Summary Report 2014

Produced by  Staffordshire  
County Council

On behalf of  Tamworth  
Borough Council

## DOCUMENT DETAILS

This document has been produced on behalf of Tamworth Borough Council by the Staffordshire County Council Insight Team



Title	Localisation of Council Tax Consultation Summary Report
Date created	September 2014
Description	The purpose of this document is to provide Tamworth Borough Council with the consultation results on their proposals for localising their Council Tax Benefit Scheme.
Produced by	Alice Walters, Research Officer, Insight Team, Staffordshire County Council Tel: 01785 278150      email: <a href="mailto:alice.walters@staffordshire.gov.uk">alice.walters@staffordshire.gov.uk</a>
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## I. EXECUTIVE SUMMARY

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The degree of endorsement for the policies was varied, with most support being received for Policy 1, which provides total protection for pensioners and those working age claimants classed as severely disabled. Least endorsement was received to Policy 6. Under this policy, claimants can protect up to £16,000 in savings and still receive support with their Council Tax bill.

There was a 'high'\* level of endorsement for four out of the ten policies and the details of these are outlined below:

- Supporting pensioners, working age people classed as severely disabled, claimants with disabled children and claimants receiving a War Pension or Armed Forces Compensation Scheme with up to a 100% rebate (Policy 1).
- Protecting claimants who are eligible for Severe Disability Premium. They can receive a reduction for up to 100% off their Council Tax bill (Policy 9).
- Including maintenance payments as income when calculating a Working Age claimant's Council Tax Reduction entitlement (Policy 8).
- Working Age claimants (not protected) have to pay at least 25% of their Council Tax bill (Policy 2).

Furthermore, five out of the ten policies received a 'moderate' level of support with between 50-74% agreeing that they were reasonable. One received 'some' support. This was Policy 6 under which claimants were able to protect £16,000 in savings and still receive support towards their Council Tax bill.

The results must be considered in the context of the respondents. The majority of respondents were residents of Tamworth (86%), who did not receive a Council Tax reduction (81%). The majority had also not been impacted by the changes. 62% had experienced a low or very low impact to the changes since April 2013.

Over one third of respondents (38%) had experienced either a medium or high impact to the changes. Whilst it is not advisable to undertake statistical analysis on their responses (as their numbers were relatively low) it is important to acknowledge that they may have a different perspective. Their commentaries are documented throughout this report and these can provide an indication of possible impacts.

It would be advisable for these to be supplemented by localised data. This for example could include looking at the local levels of arrears and bailiff referrals linked to non payment of Council Tax following the introduction of changes. This information would enable a deeper understanding of the possible impacts of reform.

\*Where the 'level of support' is quoted within this report, this is defined as:

Low: 0% - 24% agree the proposal to be reasonable

Some: 25% - 49% agree the proposal to be reasonable

Moderate: 50% - 74% agree the proposal to be reasonable

High: 75% - 100% agree the proposal to be reasonable

## 2.1 INTRODUCTION AND METHODOLOGY

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Since April 2013, Tamworth Borough Council has administered a Local Council Tax Reduction Scheme for those of working age on behalf of the Government. The Government still provides funding for localised schemes but since April 2013 it has been reduced.

In 2012 there was a public consultation to gauge views about the locally proposed scheme from April 2013. At that time, Tamworth Borough Council pledged to review its local council tax reduction scheme during its second year of operation.

As part of this review, a consultation ran between 15th July 2014 and 15th September 2014 and residents and the voluntary sector were encouraged to share their views through an online survey.

This report has been produced by Staffordshire County Council on behalf of Tamworth Borough Council and brings together analysis and key themes of all responses received.

## 2.2 RESPONDENT PROFILE

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A total of 77 respondents completed the online survey, a considerably smaller group when compared with the number of respondents who took part in the consultation last year (828). To this end, comparisons can not be drawn between the results of the two.

A full respondent profile can be found in Appendix I, but some key points include:

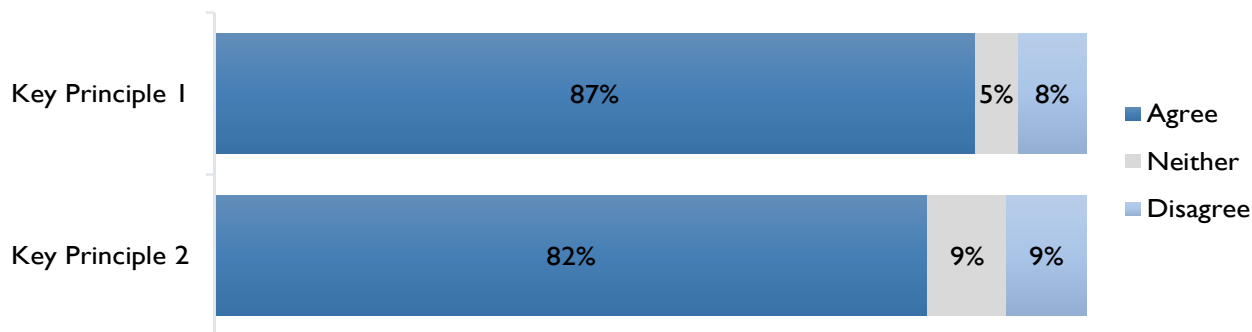
- 86% of respondents identified themselves as a resident of Tamworth.
- 9 respondents were Council Tax Reduction claimants with a further 3 being friends or relatives of a Council Tax Reduction claimant.
- 42% were from households with full or part-time workers and 18% had one or more dependent children living with them.
- The respondent group consisted of largely older people with almost a third aged 55-64 years. When comparing with the district profile breakdown by age from the most recent Mid Year Estimates it is clear that those aged 18– 34 were under-represented while those aged 55 and above were over-represented. More detail can be found in Appendix I.
- 3 respondents were responding on behalf of a voluntary organisation.

### 3. RESULTS - KEY PRINCIPLES

Respondents were invited to state to what extent they agreed or disagreed with the following two key principles:

**Key Principle 1:** Every household with working age members should pay something towards their Council Tax bill

**Key Principle 2:** The Local Council Tax Reduction Scheme should encourage people to work



As the graph above illustrates, there was a high level of support from each of the two key principles with 87% of respondent agreeing with Key Principle 1 and 82% agreeing with Key Principle 2. In both cases, over 50% of respondents stipulated that they were in strong agreement.

### 4. RESULTS - POLICIES

Respondents were invited to state to what extent they felt the following policies were reasonable or not reasonable and to offer any comments to explain why they felt that way:

#### Local Council Tax Reduction Scheme Policy 1

Pensioners receive support for up to 100% of their Council Tax bill as they are protected by the Government under a national scheme. Tamworth also protect working age claimants classed as severely disabled and in receipt of a Severe Disability Premium, claimants with disabled children and claimants receiving a War Pension or Armed Forces Compensation Scheme payment in the Local Council Tax Reduction Scheme. This means that pensioners, claimants classed as severely disabled, claimants with disabled children and claimants receiving a War Pension or Armed Forces Compensation Scheme payment are the only claimants that can receive support for up to 100% of their Council Tax bill. All other working age claimants pay something towards their Council Tax bill.



88% of respondents felt that this policy was reasonable and this was reinforced through the additional comments, “we should support those in our community who are unable to work due to age or disabilities” , “claimants who are severely disabled or with disabled children should be protected under the scheme” and “it is

*pleasing to see the elderly protected by the government safeguards”.*

However, it was posed by several respondents that rather than roll out a standard approach across the district, cases should be considered at an individual level, *“not all pensioners should automatically be protected as some may have greater capacity to contribute towards their council tax”* and that the *“circumstances of the individual play a big part of what you should receive, not a blanket amount”*. One respondent suggested that *“maybe pensioners should be means tested as some earn more than I do.”*

## Local Council Tax Reduction Scheme Policy 2

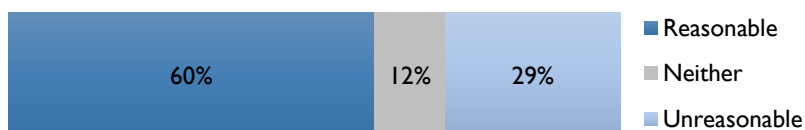
All working age claimants that are not protected have to pay at least 25% of their Council Tax bill.



While there was a high level of support for this policy with around three-quarters of respondents agreeing that it was reasonable, it was interesting to see how diverse the opinions were of those who felt this proposal was unreasonable. While there were a number of comments stipulating that it was *“unreasonable if someone on a low income has to pay at least 25% of Council Tax”* and *“morally wrong to expect them to contribute to Council Tax when it means depriving them and their children of food”*, there were also some suggestions that *“25% is not really enough”*, and that all working age claimants *“should be made to pay more than 25%”*.

## Local Council Tax Reduction Scheme Policy 3

Council Tax Reduction is limited to the level that is given for a smaller house. Tamworth limit the maximum support offered based on 75% of the Council Tax bill for a Band D property, even if the claimant lives in a property with a higher banding than D. This means that any working age claimant who lives in a property with a banding higher than D has their reduction calculated as if they lived in a Band D property.



There was moderate support for this policy with 60% of respondents stating that they felt it was reasonable. Additional comments were fairly small in numbers and showed mixed views. Some used it as an opportunity to emphasise their position of support, *“they should pay based on the property they occupy”*, *“if they can afford to purchase a large house in the first place, they should have less reduction”*. While others, who disagreed with the policy, expressed that this would be another exercise which will benefit the rich and penalise the *“many downtrodden, overtaxed and overworked ‘lower class’”*, *“tax breaks for the richer people, none for the poorest”*.

Other respondents who felt that this was not a reasonable policy, were more mindful of individual circumstance, *“it may be that some unfortunate people are in a large house, can't move and are being penalised”* and that *“at times of difficulty it would be wrong to drive people from their homes. There are good reasons why people were previously assessed as needing full council tax relief.”*

One respondent suggested that *“Council Tax should be per person and not on the size of the property”*.

## Local Council Tax Reduction Scheme Policy 4

Before April 2013, some customers were not entitled to Council Tax Benefit in their own right because their own income was too high or they had too much in savings. However, they could claim a Second Adult Rebate, for a reduction of up to 25% off their bill, because they had another adult living with them who was on a low income. From April 2013, Second Adult Rebate was removed under the Local Scheme. This means that all those of Working Age who were previously entitled to a Second Adult Rebate have to pay 100% of their Council Tax bill. (Second Adult Rebate can still be claimed by pensioners as it is in the national rules).



There was moderate support for this policy, and while very few additional comments were made, those who did felt that if people were earning a certain amount of money, then it was considered reasonable to expect them to pay the full amount,

- “Why should liable people who have the means to pay get a discount?”
- “If joint income is high then they should pay total charge”.
- “When there are 2 or more incomes in the household then the full amount should be paid unless the income falls”.

One respondent suggested that “maternity leave should be considered” while another felt that “pensioners should not be exempt - it is completely unfair to protect wealthy pensioners, and this should be income based rather than age-based”.

## Local Council Tax Reduction Scheme Policy 5

We disregard child care costs when calculating Council Tax Reduction. This does not contribute to any reductions but provides an incentive for parents to stay in work or return to work.



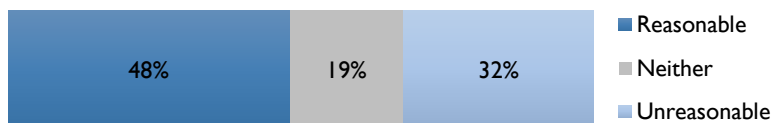
While there was moderate support shown for this policy, the additional comments highlighted that some respondents did not understand how the policy would provide an incentive for parents to stay in or return to work since “child care costs are a significant household bill for many families”:

- “The expense of child care must be taken into consideration...or am I misunderstanding this?”
- “I don't really understand this. To disregard child care costs is to disregard the most major outgoing of these people you are seeking to incentivise to work! Why should these be disregarded?”
- “The main disincentive for working parents not to work is the high cost of child care”
- “It doesn't provide an 'incentive', it forces the desperate to take up low paid and exploitative work”



## Local Council Tax Reduction Scheme Policy 6

Claimants are able to have savings of up to £16,000 and still receive support towards their Council Tax Bill.



There was some support for this policy, with just under half of respondents agreeing that it was reasonable to have savings and still receive support towards their Council Tax Bill. However, almost a third of the respondent group did not agree with this policy and the majority of additional comments were made by this group:

- “You should support yourself to some extent if you have any savings above £5,000” .
- “If you have savings then they should be used first”.
- “People with full time jobs probably don’t have savings of £16K”.
- “Any support should be for those who REALLY need it”.

One respondent suggested whether “ it would be possible to have a **sliding scale** for the savings calculation, rather than a fixed £16000?”.

## Local Council Tax Reduction Scheme Policy 7: Child Benefit is not included as income when calculating a claimant’s Council Tax Reduction entitlement.



There was a moderate level of support for this policy, with 70% of respondents agreeing that it should not be included since “Child Benefit is for the use of the child, not to finance local government”.

The additional comments section saw several respondents voicing their opinions of why they felt this was unreasonable and why they felt that it was more appropriate to include Child Benefit in the calculations:

- “Many people are paid too much Child Benefit, with the attitude that more children equals more money!”
- “Child benefit should be included in total family income. It is income!”
- “It is income paid by the tax payer”

**Local Council Tax Reduction Scheme Policy 8:** We include maintenance payments as income when calculating a Working Age claimant's Council Tax Reduction entitlement.



There was a high level of support for this policy and it was felt fair that this was included in calculations since *“maintenance is supposed to count towards living costs, Council Tax is a cost of living...”*

However, it was recognised by several respondents that there are many cases where maintenance payments are not made consistently, *“it is difficult for some single parents to get maintenance payments from former partners”*. With this in mind, some said that they would only support the proposal *“if the maintenance is guaranteed and not intermittent”* and *“if somebody is supposed to pay but doesn't then that shouldn't count”*.

One respondent felt very strongly against this policy, stating that *“this is basically taxing children. Child Maintenance is paid AFTER taxation for the upkeep of children.”*

**Local Council Tax Reduction Scheme Policy 9:** If a Working Age person receives Disability Living Allowance, a Care Component may be added if they require help with day to day tasks or if they need frequent personal care. A lower, middle or higher rate is paid depending on the care needs of the claimant. Single claimants that receive a middle or higher rate Care Component are classed as severely disabled and can attract a Severe Disability Premium too, as long as no one lives with them and no one receives a Carers Allowance for looking after them. Couples can also receive this premium as long as they both are eligible for a middle or higher rate Care Component, no one lives with them and no one receives a Carers Allowance for looking after either of them.

A Severe Disability Premium is also payable if a Working Age person (and their partner if they have one) receives a Personal Independence Payment at the Enhanced Daily Living rate and no one lives with them and no one receives a Carers Allowance for looking after them.

Claimants who are eligible to Severe Disability Premium can receive a Reduction for up to 100% of their Council Tax bill.



There was a high level of support for this policy with respondents identifying that *“this is a very vulnerable group and needs the most protection”* and agreeing that *“we need to support vulnerable people in our society”*.

While one respondent stated that *“as they are unable to work I think this would be very reasonable in the circumstances”*, another commented that *“one should not presume that all with a disability have insufficient income”* and therefore *“the level of reduction should depend on income”*.

**Local Council Tax Reduction Scheme Policy 10:** Any non-dependants living in a Working Age claimant's household are expected to contribute towards the Council Tax bill. If the non-dependant is not working then their contribution would be £5 per week. If the non-dependant is working then their contribution would be £10 per week.



There was a moderate level of support for this policy with 71% agreeing that this was reasonable. “non dependants utilise the same services as others so should pay their full contribution”, “everyone needs to contribute”. However, several comments were made about “Council Tax being payable on the property not on individuals living in that property” with this policy being cited as “mixing the two”.

Some respondents expressed some caution, one stated that “it should depend on financial circumstances of the family” while another commented that “it depends on the non-dependent's income. This would be significant for some people on low wages or low benefits - so you need to consider their income, rather than put in a flat rate.” One respondent voiced a concern about how the payment would be collected, “do not expect the householder to demand payment.”

## 5. RESULTS - IMPACTS OF THE CHANGES

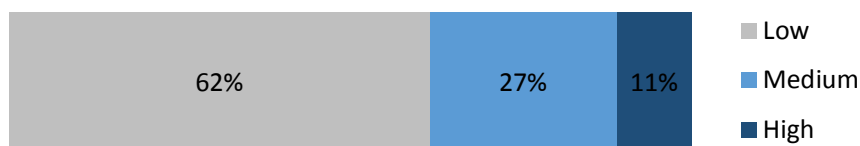
Respondents were asked a series of questions to ascertain how they feel the changes implemented from April 2013 have impacted on both their individual circumstances as well as some of the key groups. This section displays the results from these questions.

### Does your household receive Council Tax Reduction?



Just 16% (12) respondents live in a household which receives Council Tax Reduction and consequently, as the graph below shows, the impacts felt on individual financial situations have been low for almost two-thirds of the respondent group.

### What level of impact have the changes had on you and your household?



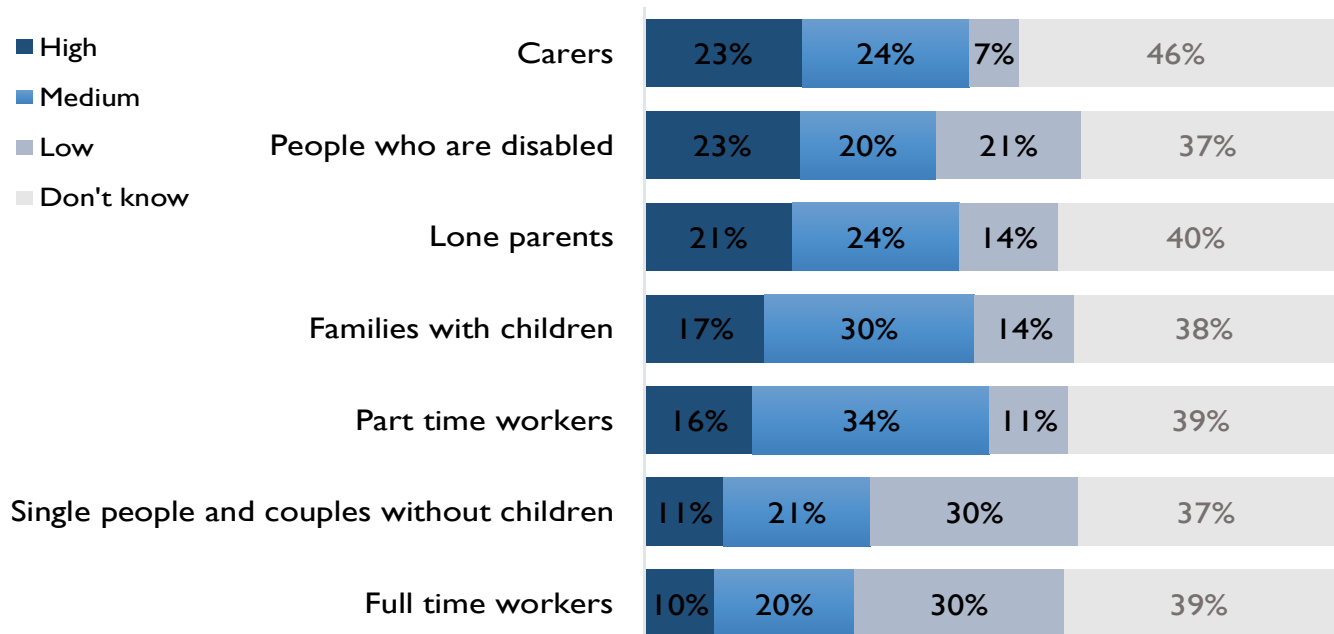
Additional comments made by respondents included some personal concerns:

- *"I am on maternity leave this should be taken into consideration as my income is half what it would be".*
- *"Less money to spend on children as maintenance money is taken into account".*

As well as considerations for others in more difficult situations than themselves:

- *"I pay my full Council Tax bill with no rebate so this has not affected me but I have seen the difficulties it has caused to single parent families".*
- *"Most are now in debt and have had attachments to their benefits making them even poorer than previously. Great going! Rich get richer poor get into poverty."*
- *"My concern is with those families who are dependent on benefits because they are in low paid and exploitative work or are unemployed through no fault of their own. It seems wrong to take more money away from them when the wealthiest people in society, many of whom contributed to the financial crash in 2007 are seeing their wealth increase substantially."*

**Please tell us whether you think the changes had a high, medium or low impact on each of these groups.**



The graph above illustrates how a sizeable proportion of the respondents were unable to assess how the changes had impacted on certain groups, acknowledging that they “have no knowledge of their income changes or personal lives”.

However, those who have provided answers felt that carers, people who are disabled and lone parents are more likely to feel high level impacts from the changes, while full time workers, single people and couples without children are more likely to feel much lower impacts.

When asked whether they felt there could be any other groups affected by these changes, the following answers were given:

- “Older people prior to pension age living on part time earnings”
- “Part time workers are often on zero hours contracts and if they do not get enough hours of work they cannot claim benefit for the shortfall and so cannot pay rent /mortgage so could lead them to becoming homeless and unable to pay Council Tax”
- “Unemployed, long term sick, low-income workers (more now than ever)”

Further additional comments included:

- “Some family difficulties where parents aren't working but a young person gets their first job, however good learning curve for the young persons future, everything costs someone something.”
- “For ALL people on benefits already struggling to feed themselves and family this change took away vital money and hence food from their plates. Low-income workers sometimes struggle as much as those on benefits and thus will increasingly find they cannot justify working and resort back to benefits curtailing any progress they might make in life.”.
- “I am retired but believe that instead of council tax being capped by government and making councils introduce reduction schemes, the Council should be able raise the necessary saving of £700k in other ways”
- “These sort of changes only normally affect the people with work, have worked before retirement or those with no children. People on benefits or with large numbers of children that do not want to work are normally the ones that benefit most as they never have to pay a penny towards their Council Tax!”
- “This is called Council Tax reduction but it seems that more people will have to pay”.

## 6. APPENDIX I: RESPONDENT PROFILE

### Are you a resident of Tamworth?

Survey responses		
	No's	%
Yes	65	86%
No	11	14%

### Does your name appear on the Council Tax bill for household?

Survey responses		
	No's	%
Yes	66	89%
No	7	9%
Don't know	1	1%

### Are you submitting your views as....

Survey responses					
	No's	%		No's	%
Voluntary organisation	3	4%	A friend of a Ctax Reduction claimant	1	1%
Community group	0	0%	Nationally or locally elected member	1	1%
Housing Association	1	1%	Partner organisation	1	1%
Private landlord	9	12%	Resident of Staffordshire	38	49%
A Ctax Reduction claimant	9	12%	None of these	12	16%
A relative of a Ctax Reduction claimant	2	3%	Other	4	5%

### Does your household receive any of the following benefits?

Survey responses		
	No's	%
Attendance Allowance	0	0%
Carers Allowance	3	4%
Child Benefit	13	17%
Child Tax Credit	2	3%
Disability Living Allowance/ Personal Independence	7	9%
Housing Benefit	5	6%
Income Support	0	0%
Job Seekers Allowance	1	1%
Employment and Support Allowance	1	1%

### Do any of the following describe your household?

Survey responses		
	No's	%
A family with one or two dependant children	14	18%
A family with three or more dependent children	2	3%
A lone parent household	3	4%
A household with full and/or part-time workers	32	42%
A household that includes someone who is disabled	5	6%
A single person household or a couple without children	10	13%
None of these	16	21%

**Do you regularly provide unpaid support caring for someone?**

Survey responses		
	No's	%
Yes	14	20%
No	55	80%

**Are you male or female?**

	Survey responses		Tamworth MYE 2013
	No's	%	%
Female	35	46%	51%
Male	41	54%	49%

**Do you consider yourself to have a disability?**

	Survey responses		Tamworth 2011 Census comparison
	No's	%	%
Yes	17	23%	18%
No	56	75%	82%
Prefer not to say	2	3%	N/A

**What type of disability do you have?**

Survey responses		
	No's	%
Communications	0	0%
Hearing	3	18%
Learning	0	0%
Mental Health	2	12%
Mobility	3	18%
Physical	5	29%
Visual	3	18%
Other	1	6%

**What is your age?**

	Survey		Tamworth MYE 2013
	No's	%	%
18-24	2	3%	10%
25-34	5	6%	17%
35-44	15	19%	18%
45-54	17	22%	18%
55-64	24	31%	16%
65-74	13	17%	13%
75+	1	1%	8%

**What is your ethnicity?**

	Survey responses		Tamworth 2011 Census comparison
	No's	%	%
White British	71	93%	95%
White-Other	2	3%	2.3%
Prefer not to say	2	3%	N/A
Other	1	1%	2.7%

**Are you receiving a Retirement Pension or Pension Credit?**

Survey responses		
	No's	%
Yes	19	26%
No	52	71%
Prefer not to say	2	3%

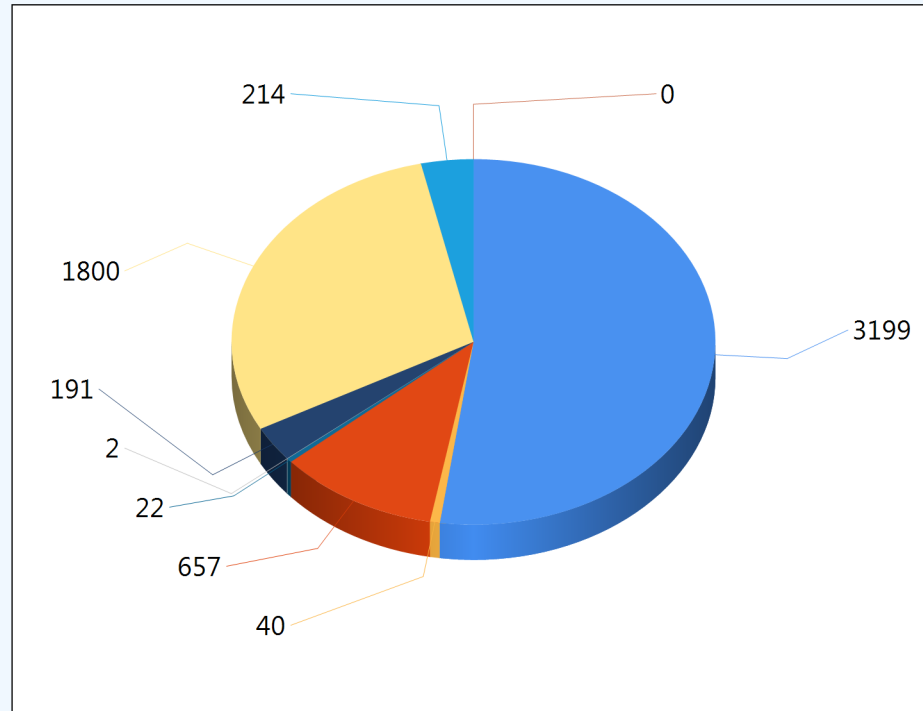
**What is your relationship status?**

Survey responses		
	No's	%
Single	19	26%
Married	47	64%
Living as a couple	6	8%
Civil Partnership	1	1%
None of these	1	1%
Prefer not to say	0	0%

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CTS Caseload as of 01.10.2014

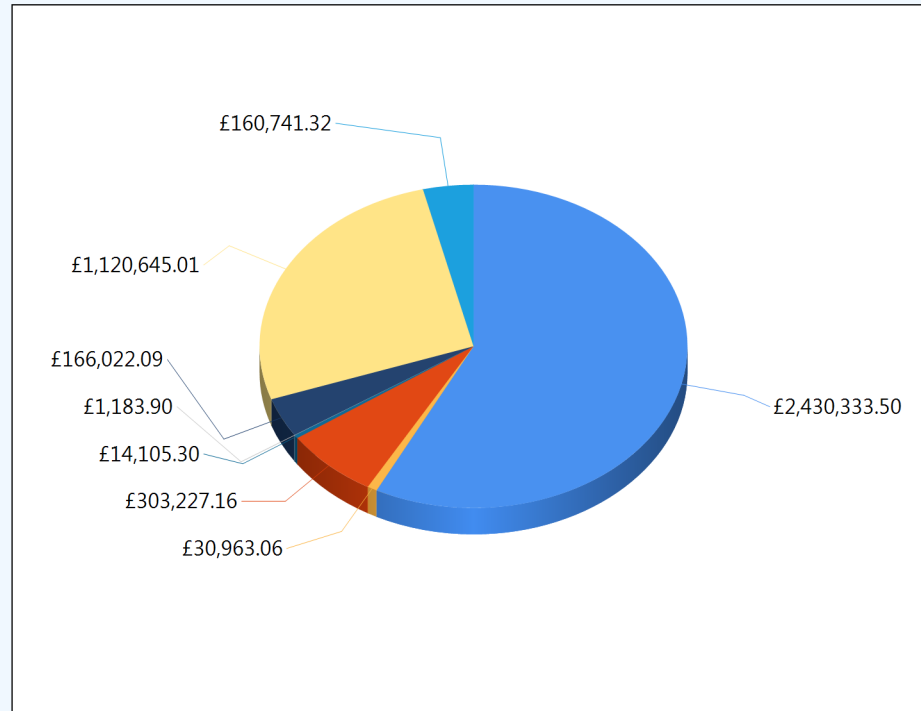


**Group Legend**

- Elderly
- Working Age-Non-Passported-Disabled Child Premium
- Working Age-Non-Passported-Other
- Working Age-Non-Passported-Severe Disability
- Working Age-Non-Passported-War Pensioners
- Working Age-Passported-Disabled Child Premium
- Working Age-Passported-Other
- Working Age-Passported-Severe Disability
- Working Age-Passported-War Pensioners

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CTS Expenditure as of 2014-2015



**Group Description**

- Elderly
- Working Age-Non-Passported-Disabled Child Premium
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- Working Age-Passported-Disabled Child Premium
- Working Age-Passported-Other
- Working Age-Passported-Severe Disability

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THURSDAY, 23 OCTOBER 2014

## REPORT OF THE PORTFOLIO HOLDER FOR ECONOMY AND EDUCATION

## COMMUNITY INFRASTRUCTURE LEVY AND PLANNING OBLIGATIONS

## EXEMPT INFORMATION

## PURPOSE

To seek authorisation to consult on the preliminary draft charging schedule, approve the draft Regulation 123 list and to release s106 monies.

## RECOMMENDATIONS

- 1) The Preliminary Draft Charging Schedule is approved for 6 week public consultation in accordance with the Community Infrastructure Levy Regulations 2010 (as amended)
- 2) The draft Regulation 123 list is approved
- 3) Existing s106 monies from Car Parking Commuted Sums accounts totalling approximately £89,111.83 (less £83k already released), Highways Commuted Sums totalling approximately £124,656.78, Recreation Facilities totalling approximately £9,696 are released to increase the Gateways Capital project budget as detailed in the report in accordance with the legal agreements, local policy and the NPPF
- 4) Existing s106 monies from Recreation Facilities accounts totalling approximately £54,309 are released to create the Wigginton park capital project budget as detailed in the report in accordance with the legal agreement, local policy and the NPPF
- 5) Existing s106 monies from Recreation Facilities accounts totalling approximately £11,108.58 are released to increase the Broad Meadow capital project budget as detailed in the report in accordance with the legal agreement, local policy and the NPPF
- 6) Existing remaining s106 monies from account Recreation Facilities totalling approximately £123,226.26 is released to create an Open Space Capital Project budget and the Portfolio Holder for Economy and Education and the Portfolio Holder for Environment and Waste Management are given delegated authority to approve their final use in accordance with the legal agreement, local policy and the NPPF

## EXECUTIVE SUMMARY

## 1) Community Infrastructure Levy

The Community Infrastructure Levy (CIL) came into force in April 2010. It allows local authorities in England and Wales to raise funds from developers undertaking new building projects in their area. The money can be used to fund a wide range of infrastructure that is needed as a result of development. This includes new or safer road schemes, flood defences, schools, hospitals and other health and social care facilities, park improvements, green spaces and leisure centres. The Regulations also restrict the use of Section 106 to collect developer contributions.

Tamworth Borough Council, under the Regulations is classed as the 'Charging Authority' and is able to put in place a 'Charging Schedule' which sets out rates (in £'s per Sq. M.) that the Levy is charged for different types of development.

Tamworth Borough Council will also be the 'Collecting Authority' and will have responsibility for issuing liability, commencement and demand notices. The Council will also have Enforcement Powers to be used for example if the required Levy has not been paid. The Council will also have to make decisions about what infrastructure to fund and when.

In May 2012 Cabinet considered whether or not to seek to introduce a Community Infrastructure Levy (CIL) charging schedule and gave authority to officers to start work on the production of the evidence base and preliminary draft charging schedule for further consideration by Cabinet prior to public consultation. The decision to proceed with a CIL recognised that the funding gap for the delivery of infrastructure could not be bridged by CIL alone. The report also included a timetable for production and adoption. This timetable has slipped considerably due to the withdrawal of the Local Plan in March 2013. The NPPF requires that an 'up to date' Local Plan is adopted by the local authority before a CIL can be adopted.

To support the production of the Local Plan, the existing evidence base on viability needed to be updated. A study has been undertaken looking at the costs of development in Tamworth, the costs of the policies in the Local Plan, including Affordable Housing, and what may be left over for a potential CIL rate. A residual value approach to viability appraisal was undertaken for residential and non-residential schemes to inform the study recommendations. The planned growth is based on delivery taking place in parallel within the smaller urban brownfield sites and four strategic greenfield sites. There was a general consensus from stakeholders and research that there is one single mid-range value zone in Tamworth. The two policies identified as directly impacting on viability were affordable housing and infrastructure. The emerging recommendations have informed the Local Plan policies - adopting an 'iterative approach' to guide policy so that the proposed policy obligations do not threatened the whole plan viability, and support the delivery of development.

Based on the work undertaken, only residential schemes greater than two units of 210 sqm gross floor space and retail schemes which take place out of centre support a CIL. The rates proposed are £35 per square metre for residential and £200 per square metre for out of centre retail. The preliminary draft charging schedule is attached in appendix A.

The residential charge is comparable with nearby authorities and the retail charge is higher than others. This reflects the success of Ventura park in area such as Tamworth where land values are relatively low.

Local Authority	Stage	Residential charges	Commercial / Retail Charges	Others
Birmingham	Preliminary Draft Charging Schedule Published	Two residential charging zones with rates of £55 and £115 per square metre. Two hotel charging zones with rates of £45 and £25 per square metre.	Two supermarket charging zones with rates of £150 and £380 per square metre. All other retail developments will be charged £150 per square metre.  Three office development charging zones with rates of £15, £25 and £55 per square metre	No charge for all other uses.
Cannock Chase	Preliminary Draft Charging Schedule Published	Residential developments will be charged £40 per square metre.	Supermarkets, superstores and retail park developments will be charged £60 per square metre	No charge for all other uses.
Lichfield	Preliminary	Two residential	Supermarkets will be charged	No

	Draft Charging Schedule Published	charging zones with rates of £50 and £30 per square metre.	£160 per square metre. Retail warehouse developments will be charged £100 per square metre. Neighbourhood convenience retail developments will be charged £35 per square metre.	charge for all other uses.
Shropshire	Adopted	Two residential charging zones with rates of £40 and £80 per square metre	No charge for retail or commercial developments.	No charge for all other uses.

The next steps are to consult on the preliminary draft charging schedule (PDCS) for a period of 6 weeks. It is hoped that this can be undertaken at the same time as the Pre-Submission Local Plan consultation. An indicative timetable for the production, examination and adoption of CIL is as follows:

Consultation on PDCS	6 weeks – end of October to early December 2014
Full Council consider Draft Charging Schedule	December 2014
Consultation on DCS	January 2015
Submit Charging Schedule	February 2015
Examination	March / April 15 (to follow Local Plan examination)
Inspectors Report	Early summer 2015
Adoption of CIL	Autumn 2015

In addition the Council needs to put in place the relevant procedures and processes for collecting the Levy; for determining priorities for spending the collected monies; and allocating monies to schemes. The Planning Advisory Service have offered free support to help draft the procedures and processes and work with officers will begin in late October on this. In addition the Tamworth Strategic Partnership has established an officer group from across the Borough and County Council, the Environment Agency, Highways Agency and neighbouring authorities. The remit of the group is as follows:

- To produce a yearly work plan for agreement by the Tamworth Strategic Partnership Board
- To identify the infrastructure needed to support the current and future communities of Tamworth
- To identify funding available to deliver infrastructure
- To recommend to the Tamworth Strategic Board priorities for delivery
- To develop and maintain the Infrastructure Delivery Plan
- To monitor and report to the Board progress against the IDP

## 2) Infrastructure Delivery Plan

Through the production of the Local Plan an Infrastructure Delivery Plan has been compiled following technical consultation with organisations such as the County Council and Environment Agency and through the TSP officer group. This identifies what infrastructure is required to support new development and the vision for the town, when it is needed, how it is going to be delivered and by whom.

The draft Infrastructure Delivery Plan (IDP) is included in Appendix B. This forms part of the Local Plan which is due to go to public consultation in October prior to being submitted to the

Secretary of State for an independent examination. The IDP identifies total known infrastructure costs of c£75m although this does include a cost of c£30m for improvements to the Water Orton Rail Corridor. The identified funding gap for all of the infrastructure after taking into account the amount already committed and anticipated is c£33m. One of the requirements to be able to implement a CIL is to have a funding gap.

The IDP will evolve over time as infrastructure is delivered and new infrastructure needs are identified. It is anticipated that the TSP will review the ISD annually and update it.

### 3) Planning Obligations and Regulation 123 list

As previously reported the CIL Regulations will restrict the ability to pool s106 obligations for pieces of Infrastructure. Originally the cut off date was going to be 1<sup>st</sup> April 2014 but the Government have extended this to the 1<sup>st</sup> April 2015. After this date the Council will not be able to collect more than 5 planning obligations (which are back dated to include those collected since 6<sup>th</sup> April 2010) for a project. It is considered any 'lost' s106 monies in the interim until CIL is adopted is likely to be low and where appropriate alternative s106 contributions may be sought.

Until CIL is in place the Council will need to ensure that development mitigates its impact through appropriate planning obligations. This will be straight forward for site specific infrastructure but whereas in the past contributions have been collected for general open space improvements or contributions to increase education facility capacity, these will no longer be able to be done. Therefore any planning obligations will need to be specific about what the obligation is for in relation to these types of infrastructure.

[Regulation 123](#) of the Community Infrastructure Levy Regulations, as amended by the [2011](#), [2013](#) and [2014](#) Regulations, provides for charging authorities to set out a list of those projects or types of infrastructure that it intends to fund, or may fund, through the levy.

Where the regulation 123 list includes a generic type of infrastructure (such as 'education' or 'transport'), section 106 contributions cannot be sought on any specific projects in that category. A draft Reg 123 list has been prepared and is included in Appendix C. This contains specific pieces of infrastructure and generic infrastructure and for those items on the list, once CIL is adopted, no s106 monies can be collected. However, the ability to charge CIL on all development should not result in any significant reduction in overall levels of planning obligation.

It should be noted that Affordable Housing is excluded from CIL and therefore will continue to be secured through s106's.

### 4) Existing planning obligations

As detailed above, the Council has previously collected s106 monies for a range of generic infrastructure such as open space enhancements and maintenance, and a town centre commuted sum in lieu of on site provision of car parking to enhance access to public transport, make environmental improvements within the Town Centre Commuted Sums Area and improve public car parking.

Officers have identified a series of projects to utilise these funds that are in accordance with the adopted policy and the section 106 legal agreement. These are summarised below and authority is sought to allow officers to work up the final schemes and check the legal agreements to ensure the monies are spent in accordance with the agreement and for the relevant portfolio holders to approve them. This approach was taken to the TSP Infrastructure group and they endorsed the proposed approach.

#### Town Centre Commuted Sums

There is approximately £89,111.83 (interest is added throughout the year so final figures may vary) that has been collected. £83k of this has previously been allocated, but not yet spent,



to support the Gateways project in the 2013/14 capital programme.

There are also further funds of £238,852.88 for specific highways improvements related to developments including such items as finger posts and cycle links. It is proposed to allocate approximately £124,656.78 from this cost centre to the Tamworth Gateways project the objectives of which are as follows:

- Create welcoming gateways to town centre
- Improve legibility
- Promote pedestrian and cycle priority access to key functional movement corridors
- Identify and promote key development sites

Work has focused on developing the links between the town centre and Ventura park and the town centre and the railway station. Landscape Architects have produced schemes and now the County Council are working up detailed engineering designs for the Town Centre – Ventura Link with a hope that work can start on site in early 2015 focusing on the Ladybridge part of the link (phase 1) with the remaining part of the route being implemented once the County Council have identified funding. The proposed improvements have been broken in to stages to be implemented as funding allows. It is recommended that the following contributions are released to the project in addition to the existing capital monies and an indication of which phase they will be allocated to is shown.

Account Code	Account Name	Approx*	Contribution to Phase 1 Budget	Contribution to phase 2 budget
R6051	Car Parking (Town Centre Plan)	55,833.83	0	55,833.83
R6053	11 Silver Street (Car Parking)	9,614.00	0	9,614.00
R6055	Car Parking 34 Market Street	1,243.00	1,243.00	0
R6057	58 Albert Road	2,013.00	2,013.00	0
R6058	2a George Street	3,021.00	3,021.00	0
R6064	Contribution Re 22 George St	8,284.00	0	8,284.00
R6066	21 Church Street	7,040.00	7,040.00	0
R6067	17 Lower Gungate	1,032.00	1,032.00	0
R6068	Magistrates Court	1,031.00	1,031.00	0
R6602	Bitterscote Links li	12,910.78	12,910.78	0
R6608	Sec 106 Bonehill Rd Hamer Ford	48,981.00	48,981.00	0
R6610	Cin Ventura Park Road	2,206.00	0	2,206.00
R6611	Finger Posts Cardinal Point B & Q	5,124.00	5,124.00	0
R6612	Finger Posts John Lewis	5,119.00	5,119.00	0
R6613	Allied Carpet Site Travel Plan	251.00	0	251.00
R6614	JB Aucott Gateway Project	50,065.00	0	50,065.00
		<b>213,768.61</b>	<b>87,514.78**</b>	<b>126,253.83</b>

\*due to interest earned the final amounts may differ when drawn down

\*\*£83k of this has previously been allocated, but not yet spent, to support the Gateways project in the 2013/14 capital programme.

There are also monies available in the Recreation Facilities accounts (approximately £198,339.84) for enhancements to open space which would be suitable for undertaking work in the castle grounds associated with the project (for example, landscaping works) as follows:

Account Code	Development Name	Approx Amount*
R6217	17 Victoria Road	1,708.00
R6307	42 & 42a Victoria Road	5,091.00
R6314	Olivers 19 Lower Gungate	1,059.00
R6315	8 Aldergate	527.00
R6317	5 Albert Road	791.00
R6330	8 Aldergate	520.00
		<b>9,696</b>

\*due to interest earned the final amounts may differ when drawn down

#### Open space Enhancements

There is approximately £198,339.84 in the Recreation Facilities accounts for enhancements to open space. The agreements have been mapped against a 400m buffer of existing open spaces. The emerging Local Plan requires new development within 400m of existing open space should contribute to its maintenance, improvement or access to, the 400m buffer was informed by the 2012 Open Space Review. All of the agreements with the exception of one are within 400m of an open space. The one exception is to the north of the town is approximately 450m from an open space. A number of potential projects have been identified that would benefit from funding by the officer group. Two specific ones are Wigginton park and Broad Meadow. It is recommended that the following funds are released to these projects:

#### Wigginton Park

Account Code	Development Name	Approx Amount*
R6213	Masefield Drive Open Space	406.00
R6219	Land At Lud Lane	830.00
R6319	41 Coton Lane	784.00
R6332	107 Comberford Road	1,038.00
R6336	Solway Cl - Bellway Homes	20,163.00
R6342	Flat 4 Coton Precint	507.00
R6344	Coton Hall Farm	1,511.00
	Coton Hall Farm Phase 2	6,000
R6348	Garage Sites Leyfields	10,033.00
R6349	Garage Sites Leyfields Ph2	11,036.00
R6353	77 Wigginton Road	2001
		<b>54,309</b>

\*due to interest earned the final amounts may differ when drawn down

#### Broad Meadow

Account Code	Development Name	Approx Amount*
R6345	22 Lichfield Street	504.00
R6346	67a Halford Street	504.00
R6304	Jolly Sailor Site - W Ashley	5,635.58
R6340	The White House 93lichfield St	4,465.00
		<b>11,108.58</b>

\*due to interest earned the final amounts may differ when drawn down

With regards to the remaining funding, it is proposed that the officer group is expanded to include representatives from Planning, Street Scene, Community Leisure, Community Development and Housing. The remaining funding totalling approximately £123,226.26 is requested to be released and it will be allocated to projects as they are further developed by the project group and IDP officer group after the agreement of the Portfolio Holder for Education and Economy and the Portfolio Holder for Environment and Waste Management.

## **OPTIONS CONSIDERED**

- Higher and lower rates for CIL were considered through the evidence base, however, it is felt that the proposed rates strike the appropriate balance required by the Regulations.
- Options for spending the existing s106 have been looked at by the officer group. The funding could be spread over more smaller sites however, given the small amounts involved this would not be the most efficient use of resources. By grouping the monies into the two identified project and greater impact can be achieved.

## **RESOURCE IMPLICATIONS**

A budget already exists for the preparation of a CIL.

It has been estimated that from the point of adoption of a CIL until 2031 the likely CIL receipts will in the region of £2.8m. However, if planning applications are approved prior to the adoption of CIL this figure will be less, although s106 should capture the necessary planning obligations.

Capital funding has already been allocated to the Gateways project. The County Council are seeking additional funding through s106 agreements, Local Transport Plan programme, Local Sustainable Transport Fund funding and Local Growth Fund funding.

## **LEGAL/RISK IMPLICATIONS BACKGROUND**

The legal implications of CIL are covered in the report.

The legal agreements for the identified s106 monies need to be checked to ensure they allow for the spend as proposed. If they do not the monies will have to be allocated to other projects.

## **SUSTAINABILITY IMPLICATIONS**

The CIL will assist in delivering infrastructure which is needed to allow sustainable growth of the Borough.

## **BACKGROUND INFORMATION**

### **REPORT AUTHOR**

Matthew Bowers, Head of Planning and Regeneration x276

### **LIST OF BACKGROUND PAPERS**

Report to Cabinet, "Community Infrastructure Levy", 30<sup>th</sup> May 2012  
Whole Plan Viability, Affordable Housing and CIL Study, 2014

### **APPENDICES**

- A) Preliminary Draft Charging Schedule
- B) Infrastructure Delivery Plan
- C) Regulation 123 list

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# **Tamworth Borough Council**

## **Community Infrastructure Levy**

### **Preliminary Draft Charging Schedule For Public Consultation**

October 2014

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# 1. Introduction

- 1.1 The Community Infrastructure Levy (CIL) is a tariff upon development which Local Authorities can charge in order to raise funds to contribute to the delivery of new infrastructure which arises as a result of development in an area. This could be expanded schools, flood defences, sports and recreation facilities and improvements to the transport network. It is important to understand that the amount of CIL raised will not cover all of the funding required to pay for new infrastructure, but will be part of a wider package of finance measures which will come from a range of sources.
- 1.2 The CIL regulations were introduced in 2010. Prior to the introduction of the Regulations, funding of infrastructure has largely been delivered from a small number of major schemes where planning obligations (Section 106 agreements) have been completed prior to the grant of planning permission. However, this particular mechanism is more restrictive than CIL and, from April 2015 onwards no single piece of infrastructure will be able to be funded from more than five S106 obligations. This has particular implications for infrastructure requirements which arise as a result of the cumulative effects of development such as the provision of secondary education or the capacity of the road network for instance. CIL has no such restrictions and can be pooled to address these needs.
- 1.3 CIL applies to all eligible development involving a net increase of 100 square metres and above of floor space, whereas S106 tends to be subject to higher thresholds in terms of the size of development. This means that even the smallest eligible developments will pay a contribution to deliver infrastructure across Tamworth.
- 1.4 In order to introduce CIL the Council needs to have
- An up-to-date Local Plan setting the planning policy context for the amount and location of new development proposed within Tamworth (anticipated to be in place 2015)
  - Evidence from the Infrastructure Delivery Plan (IDP), which accompanies the Local Plan that there is a need for funding for the necessary infrastructure to be provided from CIL.
  - Approval of the proposed charging rates following an independent examination where the main issue to address, other than the need for CIL funding is impact on viability of development.
- 1.5 The CIL works by charging a set rate per square metre of eligible development involving a net increase of 100 square metres and above of floor space. This Preliminary Draft Charging schedule (PDCS) sets out the proposals in relation to which types of development will be chargeable, and the amounts which will be charged in relation to these. Full details are set out in the Community Infrastructure Levy Regulations 2010 (as amended) as to how a CIL works.

1.6 This consultation on a PDCS provides the first opportunity for persons to comments on the Council's proposals for setting CIL charging rates.

## **2. Stages in producing the Community Infrastructure Levy charging schedule**

2.1 The CIL Regulations set out the processes and evidence that authorities must follow and have before a Charging Schedule can be adopted. These are:

- An up-to-date Local Plan
- Appropriate viability evidence to support the economic viability test
- Consult on a PDCS
- Assess comments made during the PDCS consultation and make amendments to the charging schedule
- Consult on a Draft Charging Schedule (DCS)
- Submit the DCS together with the representations made on it for independent examination, which may include a public hearing
- The Examiner produces a report which may recommend that the Charging Schedule can be approved, approved with modifications or rejected.
- Provided that the Council is able to move the Charging Schedule forward, with or without modifications raised in the report, it can be then adopted by a resolution of Tamworth Council.

## **3. Regulations, guidance and evidence base**

3.1 The economic viability test is set out in Regulation 14 of the 2010 Regulations:

*“In setting rates (including differential rates) in a charging schedule, a charging authority must aim to strike what appears to the charging authority to be an appropriate balance between –*  
*(a) the desirability of funding from CIL (in whole or in part) the actual and expected estimated total cost of infrastructure required to support the development of its area, taking into account other actual and expected sources of funding; and*  
*(b) the potential effects (taken as a whole) of the imposition of CIL on the economic viability of development across its area.”*

3.2 The National Planning Policy Framework (NPPF) states at paragraph 175 that CIL should support and incentives new development.

3.3 The latest CIL Guidance (DCLG April 2013) advises that in setting levy rates charging authorities should take into account other development costs, “including those relating to policies on planning obligations in the Local Plan (in particular those for affordable housing and policies for major



strategic sites)”. Charging rates should not be set “right up to the margin of economic viability across the vast majority of sites in their area”.

- 3.4 The latest version of the Local Plan is the pre-submission Local Plan, which is out for public consultation alongside the PDCS. The Local Plan sets the amount of development for different land uses up to 2031. Within the Local Plan is the IDP, which will be used to inform the Regulation 123 List.
- 3.5 The IDP can be found at [LINK](#). This sets out a range of strategic and local infrastructure needs which support the Local Plan and also highlights key infrastructure which potentially could be funded in part by CIL.
- 3.6 The Regulation 123 List is a list of infrastructure that can be funded whole or in part by money collected under CIL. The list also ensures that double counting does not occur between CIL and Section 106 contributions and developers only pay once towards an item of infrastructure. A named item on the Regulation 123 List can therefore not be included in a Section 106 agreement.
- 3.7 The Council has produced a single report (Whole Plan Viability, Affordable Housing and CIL Study, 2014 WPV) which establishes the impact of the Local Plan on development viability, recommends a range of appropriate levels of affordable housing as to not impact on development viability and demonstrates a range of potential CIL charging rates on different types of development. The three aspects of the report were all produced together and therefore the cumulative viability impacts each issue may have on development have been assessed together. The report can be viewed [HERE](#).
- 3.8 The WPV assessment (Chapter 5) sets out the Local Plan policies which impact on development viability. Each policy was systematically assessed and the findings were used to inform the viability assessment. The policies were split into two layers:
  - Layer One: Affordable housing
  - Layer Two: Infrastructure
- 3.9 Together the Local Plan with the IDP and Whole Plan Viability Assessment form the basis of the CIL evidence base. It is these documents which will shape the Charging Schedule and the regulation 123 list.

## 4. Preliminary draft charging schedule

4.1 Based on the evidence provided, the following CIL rates are proposed in the table below. Commercial development is split by type and residential development is split by size. Charges have only been applied where the viability evidence indicates that the charges would not make the majority of schemes unviable and allowing a buffer for changing market conditions.

Land Use	Criteria	CIL Rate per square meter
Residential	One or two unit residential schemes of 210 sqm gross floor space exempt from CIL charge	£35
Out of Centre retail	Out of centre is defined as comparison and convenience retail development located outside of Tamworth Town Centre, local centres and neighbourhood centres as defined in the policies map and town centre inset map of the Tamworth Local Plan 2006- 2031	£200
All other development	None	£0

4.2 The regulations set out the main types of relief from CIL, these are:

- Charitable relief: if the charity owns part of the land and the development will be used wholly or mainly for charitable purposes
- Social housing relief: a mandatory exemption for social housing
- Residential extensions and annexes and self build properties – subject to eligibility testing.

4.3 CIL liability is calculated in £s per square metre applied to the gross internal floorspace created minus the gross internal floorspace of any existing buildings to be demolished provided that these buildings have been in continuous use for at least 6 of the previous 3 years.

4.4 The chargeable rate is also subject to an annually updated index of inflation using the national All-In Tender Price Index of Construction Costs published by the Royal Institute of Chartered Surveyors.

4.5 Payment is due when development commences for which permission was granted after adoption of the Charging Schedule. Full payment is normally due within 60 days but the Council has the discretion to offer the option of paying by instalments.

4.6 An alternative to cash payment can be offered in the form of land, where the Council considers this to be an appropriate means of supporting delivery of infrastructure. This process involves obtaining an independent valuation to ensure that the land value is equivalent to the alternative cash payment.

## **5. How will CIL be spent?**

5.1 Separate from the charging schedule the Council produce, maintain and update a list of infrastructure projects that it intends to fund from CIL receipts. The contents of the list will be drawn from the IDP. Appendix A of this document sets out a draft R123 list.

5.2 Regulations require that a proportion of CIL receipts are required to be passed to Parish or Town Councils where development is taking place. Tamworth is an unparished and therefore this would need to be spent in the neighbourhoods in which development is taking place. The regulations set this amount at 15%, which then rises to 25% where a group has an adopted Neighbourhood Plan

5.3 The Council can use CIL receipts for the purposes of providing, improving, replacing, operating and maintaining infrastructure. It can also pass funds onto other bodies, such as Staffordshire County Council, for the same purposes.

## **6. Planning obligations**

6.1 There will continue to be a role for planning obligations (S106s), particularly to deliver infrastructure required to enable major developments to be carried out in a sustainable way e.g. highway/transport infrastructure on or near to sites, provision of open space, sport and recreation facilities on large scale housing developments. Affordable Housing, which under the Regulations is exempt from CIL charges, will continue to be delivered via S106 agreements.

6.2 There will be a more limited role for “pooled contributions” to a specific item of infrastructure, as the Regulations place a limit of no more than five S106 agreements to be used in these circumstances from the date a charging schedule is adopted or from a nationally applicable default date of April 2015. If five or more obligations have been entered into for a specific item of infrastructure since April 2010 and before the appropriate date then no more can be completed. If less than five have been completed prior to the date then the overall limit is a maximum of five.

6.3 Infrastructure which it is intended to fund partially or entirely from CIL needs to be identified in the R123 list. No item of infrastructure included on the list can be funded from planning obligations in the form of Section 106 agreements or Section 278 agreements (under the Highways Act 1980).

Section 278 agreements however, are not subject to the same pooling restrictions as Section 106 agreements.

## 7. How to respond to this consultation

7.1 All comments should be made by **5pm on 10 December** to:

- [developmentplan@tamworth.gov.uk](mailto:developmentplan@tamworth.gov.uk)

or

- PDCS Consultation  
Development Plan Team  
Marmion House  
Tamworth  
B79 7BZ

7.2 In submitting your response you may wish to consider and provide feedback on the following key issues:

- Do you have any comments regarding the viability evidence prepared to support the Preliminary Draft Charging Schedule?
- Do you have any comments regarding the Infrastructure Delivery Plan evidence used to support the Preliminary Draft Charging Schedule?
- Do you have any comments on the broad categories of infrastructure proposed to be funded by CIL?
- Do you have any views on whether or not the Council should have an 'instalments policy' for the payment of CIL charges i.e. larger schemes being able to phase payments alongside the phasing plans of the development?
- Do you have any views on whether or not the Council should have a 'discretionary relief policy'?

7.3 Following consideration of all comments received by the deadline the Council will work towards publishing a Draft Charging Schedule. This will be subject to further consultation before being submitted for examination by an Independent Inspector in 2015. It is the Council's intention to hold the Local Plan and CIL examinations together.

## **APPENDIX B: Infrastructure Delivery Plan**

The following schedules contain details of the infrastructure required to support the development proposed by the Local Plan. The list has been compiled from the Local Plan evidence base, related infrastructure strategies and in consultation with statutory consultees and infrastructure providers. Where developers will be expected to contribute towards infrastructure items, this is supported by various policies in the Local Plan including IM1: Infrastructure and developer contributions.

The preparation of this delivery plan has been subject to review and approval by an officer's working group of the Tamworth Strategic Partnership at each stage of the Local Plan preparation. It will be subject to regular review after adoption of the Local Plan and will be published as a standalone live document to incorporate funding and delivery progress and the refinement of infrastructure needs or project details.

Infrastructure has been divided into broad categories:

- Physical Infrastructure
- Green Infrastructure
- Social and Community Infrastructure

Each infrastructure item will support one or more of the Local Plan Strategic Spatial Priorities listed in Chapter 2. Infrastructure will be provided by a number of different organisations, both public and private sector organisations and often in partnership, the key delivery agencies are listed. All infrastructure has been given a priority of either 'Other' or 'Essential'. Essential items are those critical pieces of infrastructure which must be secured in order for planned development to proceed. Other items are necessary in order to mitigate the impacts of development and to deliver the Local Plan vision but should not affect development deliverability. Costs and existing funding provision has been ascertained or estimated where possible. Infrastructure has been phased for the plan period to date where delivery is underway (2006-2014), the first five years from expected adoption (2015-2019) and the remainder of the plan period for medium to long term aspirations (2020-2031). Funding will be sought from different sources, including competitive bidding for regional, national or European funding in addition to any developer contributions. Developer contributions may take the form of either planning obligations under Section 106 agreements or through the adoption of a Community Infrastructure Levy.

Two summary tables are included after the infrastructure schedules showing information for the whole plan period and the first five years from adoption. The first gives a break down of the cost by subcategory and priority. The second shows the funding gap between estimated costs and existing funding.

Physical Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
<b>Transport</b>										
<b>Cycle and Pedestrian Links</b>	SP2 SP4 SP5 SP6 SP7 SP12	The Ventura Park/Town Centre/Rail Station Corridor Local Transport Package: Cycling and Pedestrians	Improved surface treatment, lighting and signage to town centre leading to an increase in the number of trips made by foot or cycle	Staffordshire County Council (SCC), Tamworth Borough Council (TBC)	Other	£2,500,000 Ventura and Town Centre  £1,000,000 Railway Station and Town Centre	£530,000 s106  £100,000 SCC	2006-2014 2015-2019	Developer Contributions Further bids for funding through Local Transport Plan , Local Enterprise Partnership and Single Local Growth Fund	Toucan crossing installed across River Drive
		North Tamworth Local Transport Package: Cycling and Pedestrian Links	Links from Anker Valley to railway station, town centre and education facilities to allow trips by foot or cycle	SCC, Developer	Essential	£500,000 Footbridge over Derby line		2015-2019	Developer Contributions	
		Additional Cycling and Pedestrian Links to Anker Valley	Links to railway station, town centre and education facilities to allow trips by foot or cycle	SCC, London Midland	Other	£100,000 (Footpath improvement through station fields)  £600,000 (Cycle link to Amington)  £150,000 (Station access )		2020-2031	Developer Contributions	Essential if new development served by Gungate corridor exceeds 500 dwellings
		Borough Wide Cycle and Pedestrian Network Links	More comprehensive cycle and pedestrian network linking residential areas to the town centre and employment areas to increase active transport by foot or cycle	SCC, TBC, Developers	Other	Unknown		2006-2014 2015-2019 2020-2031	Local Transport Plan, Developer Contributions	Where possible to address gaps in the network, for example a link between existing cycle paths at Orkney Drive and Shannon
<b>Rail</b>	SP2 SP12	Water Orton Rail Corridor Enhancement and New Local Train Service	Turnback siding and crossover at Tamworth enabling dedicated local service to Birmingham, increasing the percentage of commuters travelling by public transport and diversion of private car users commuting to Birmingham	Network Rail, London Midland, Centro	Other	£30,000,000	£3m Coventry and Warwickshire Local Transport Body, £12m rail industry, £0.5m CENTRO.	2015-2019	Local Transport Body, Rail Companies, CENTRO	Being promoted by Centro across the Region  The County Council will be producing a Rail Strategy in 2014 to compliment the Borough Integrated Transport Strategy; A Rail Summit was held in 2013 to help confirm policy support and priorities for rail investment
		Platform Lengthening and Station Improvements at Wilnecote	Pedestrian facilities to improve access to Wilnecote Rail Station for short term delivery, supporting regeneration area; Proposals to lengthen the platforms to accommodate longer trains in longer term	London Midland	Other	Unknown		2015-2019 2020-2031	Rail Companies	
		Tamworth Station Improvements	Forecourt improvements, increased car park capacity, enhanced signing and lighting, information maps, expansion of pedestrian areas, improved footways and crossings and public realm in the vicinity of the station to increase trips by public transport	London Midland	Other	Unknown		2015-2019 2020-2031	Identified in the National Stations Improvement Programme	
<b>Bus</b>	SP2 SP4 SP5 SP6 SP12	The Ventura Park/Town Centre/Rail Station Corridor Local Transport Package: Bus	New bus stops, enhanced service, enhanced bus passenger information and infrastructure, including Victoria Road bus interchange to increase trips by public transport	SCC, Bus Companies	Other	£200,000	£200,000	2006-2014 2015-2019	Developer Contributions	Necessary for the delivery of town centre regeneration.
		Real-Time Passenger Information for Bus Stops	Real Time Passenger Information throughout the urban area, complemented by bus stop and shelter upgrades to improve journey connections and increase trips by public transport; Key local routes include Route 2 (Tamworth Town Centre-Gillway-Perrycrofts), Route 6 (Tamworth Town Centre-Ventura Retail Park-Tamworth Rail Station) and the inter-urban route between Lichfield and Tamworth	SCC, Bus Companies	Other	Unknown		2015-2019 2020-2031	SCC, Bus Companies	Bus Service Review: There is scope for infrastructure improvements in Tamworth, with Real-Time Passenger Information being more of a priority, Ventura Park being the first place where such systems would be installed, looking to roll this out across more of Tamworth in future
		North Tamworth Local Transport	Extended route service to support new	Bus Companies	Other	£360,000		2015-2019	Developer Contributions	

Physical Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
		Package: Bus	development at Anker Valley							
		Dunstall Lane Bus Service	Extended route service to support new development	Bus Companies	Other	£360,000		2015-2019	Developer Contributions	Dunstall Lane could be served by an extension to Route 6 linking into the town centre and rail station although the service frequency should be maintained where possible
		Golf Course Bus Service	Extended route service to support new development	Bus Companies	Other	£360,000		2015-2019	Developer Contributions	The golf course site could be served by Route 80 but this does not currently link into Tamworth Town Centre and therefore a new service could be considered
		Coton Lane Bus Service	Extended route service to support new development	Bus Companies	Other	£360,000		2015-2019	Developer Contributions	There may be an option to extend existing Route 3 to serve the Coton Lane development area
Canal	SP8 SP9	Canal Corridor and Towpath Improvements	Enhanced management, access and interpretation to increase use of blue corridors for active travel and improved awareness and understanding of biodiversity	Canal Rivers Trust	Other	Unknown		2015-2019 2020-2031	Canal Rivers Trust, Developer Contributions where related to access or green infrastructure	
Road	SP2 SP3 SP5 SP6	The Ventura Park/Town Centre/Rail Station Corridor Local Transport Package: Road	Roundabout junction signalisation, minor junction and car park access modifications, linked signals and urban traffic control to reduce impact of new development on local and strategic highway network, reduce congestion, improve bus journey times and reliability and support town centre regeneration	SCC	Other	£60,000 amendments to islands £160,000 second exit from Homebase  Additional interventions being costed	£60,000  £160,000	2006-2014 2015-2019	Local Transport Plan, Retail Park Businesses, Developer Contributions	Roundabout signalisation complete; Second exit from Sainsbury's complete; Design from second exit from Homebase complete
		Potential A5(T) and M42 Junction Improvements at: A5 Mile Oak A5 Ventura Way A5 Marlborough Way A5 Stoneydelph M42 Junction 10 M42 Junction 11	Junction improvements where required by the Highways Agency following detailed development proposals to reduce or prevent further congestion and queuing	Highways Agency	Other	Mile Oak: £1,349,230 Stoneydelph: £973,326  Remainder unknown		2006-2014 2015-2019	Developer Contributions, Bids for additional funding via Local Enterprise Partnership	Development in adjoining authorities may also be required to contribute
		North Tamworth Local Transport Package: Road	Modifications to A513 and B5493 junction and urban traffic control on Upper Gungate and Aldergate corridor to prevent further highway detriment from new development	SCC	Essential	£2,000,000	£1,376,000 Pinch point funding	2015-2019	Local pinch point funding secured  Developer Contributions	
		Improved Signage to Town Centre Car Parks	Improved signage to range of car parks to reduce congestion and improve use of car parks to support town centre regeneration	TBC, SCC	Other	Unknown		2015-2019	Unknown	
<b>Public Realm</b>										
Town Centre	SP2 SP7 SP9 SP10 SP12	Public Realm Enhancements Focusing on Key Gateways and Corridors  Gateways: College Campus Train Station South East Ladybridge Lichfield Street  Corridors: Upper Gungate Victoria Road Bolebridge Street Ladybridge Lichfield Street	Improved legibility to and within town centre alongside redevelopment of public and private development sites; Downgraded highways infrastructure, minimised street clutter, maximised pedestrian movement and increased visibility of key strategic movement corridors; Flooring materials, pedestrian and vehicle signage, street furniture (bins, benches, planters, lighting etc.) coordinated, rationalised where appropriate and new signage installed, including Library, Civic Space and St Editha Square	TBC, SCC	Other	To be determined as part of early design; Detailed design and costing for Creative Quarter public realm £500k		2015-2019 2020-2031	Local Transport Plan, Developer Contributions	
		Enhance Market	Provision of new stalls and more regular markets	TBC	Other	Nil		2006-2014 2015-2019	TBC	New stalls have been introduced by the market operator and a programme of additional markets is being considered
Employment Areas	SP3	Business Led Improvements to Key Traditional Employment Sites Across	Enhancements to make them more attractive, accessible, visible and durable;	Southern Staffordshire	Other	£200,000		2015-2019 2020-2031	Private sector, developer contributions where appropriate,	Bid for funding made by Southern Staffordshire Partnership

Physical Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
		Tamworth	Improvements such as: New signage Soft and hard landscaping Additional parking Security lighting and fencing Building cladding	Partnership					Local Enterprise Partnership	
<b>Water and Drainage</b>										
<b>Flood Defences</b>	SP11	Maintenance of Flood Defence Banks	Maintenance of condition of flood defence banks to prevent breach of defences and flooding of defended areas	Environment Agency	Essential	Unknown		2015-2019 2020-2031	Environment Agency, Developer Contributions	Environment Agency can calculate developer contributions



Green Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Lead and Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
<b>Strategic Green Infrastructure</b>										
<b>Sustainable Urban Extensions</b>	SP6 SP7 SP8 SP12	Dunstall Lane	Connectivity for wildlife and access to river network and canal; Sustainable drainage systems; Retention of existing field boundaries and hedgerows to act as biodiversity corridors; Green corridor and cycle route to join existing strategic cycle network along Dunstall Lane; Public open space making use of the existing green infrastructure network.	SCC, TBC, Developers, Wild About Tamworth	Other	£200,000 to £360,000		2015-2019 2020-2031	Developer Contributions Wild About Tamworth (TBC and grant finding)	
		Anker Valley	Enhance biodiversity along existing footpath by native planting; New tree planting and landscaping along site boundary with footpath to create green corridor and soften development edge adjacent the river Anker and facing Amington Hall Conservation Area; Sustainable drainage systems; Public open space making use of the existing green infrastructure network	SCC, TBC, Developers, Wild About Tamworth	Other	£100,000 to £260,000		2015-2019 2020-2031	Developer Contributions Wild About Tamworth (TBC and grant finding)	
		Tamworth Golf Course	Connectivity for wildlife and access via existing off-site canal bridge to the canal blue corridor and wider pedestrian and cycle network; Buffer to Local Nature Reserve, Site of County Biological Interest and Site of Special Scientific Interest and connecting wildlife corridors; Sustainable drainage systems and opening of existing culverts; Recreational routes within site for dog walking as well as pedestrians and cyclists; Public open space making use of the existing green infrastructure network	SCC, TBC, Developers, Wild About Tamworth	Other	£200,000 to £360,000		2015-2019 2020-2031	Developer Contributions Wild About Tamworth (TBC and grant finding)	
<b>Wilnecote Regeneration Corridor Green Links</b>	SP6 SP7 SP12	Green infrastructure to complement redevelopment and refurbishment in the regeneration area	Planting and cycling and pedestrian links between Wilnecote Regeneration Corridor and surrounding areas	Developers, TBC	Other	£50,000 to £100,000		2020-2031	Developer contributions	
<b>Borough Wide Access</b>	SP6 SP7 SP12	Exploring Tamworth - Three successively wider circular routes incorporating existing footpaths or bridleways that permeate town and pass through open countryside	Route enhancement, planting, wayfinding and promotion to improve access and recreational use of green infrastructure network	TBC, Tame Valley Wetlands Partnership, Central Rivers Initiative	Other	£50,000 to £100,000		2020-2031	Developer contributions (Strong possibility to overlap with routes provided by Central Rivers Initiative and Tame Valley Wetlands Partnership)	
		Central Rivers Initiative (Tamworth)	Formalisation and enhancement of cycle and canoe links North and South to improve access to wetlands beyond Tamworth; Viewing towers at Tame Valley Wetlands; Promotion to visitors and support for existing Castle Grounds Hub for cycling access to North South routes	Central Rivers Initiative, TBC, Castle Grounds Businesses, Tame Valley Wetlands Partnership	Other	Unknown		2015-2019 2020-2031	Central Rivers Initiative partners and funding bids	

Green Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Lead and Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
		Tame Valley Wetlands Partnership	<p>2 historic Grade II listed structures restored</p> <p>50 hectares of wetland habitat created / enhanced and 1,000 metres of river re-naturalised</p> <p>5 Local Biodiversity Action Plan / endangered species protected</p> <p>1,000 m of historic hedgerows restored or re-planted</p> <p>1,000 m of river or canal bank re-naturalised</p> <p>3 local groups established / supported, plus a series of working groups set up</p> <p>1,000 school children, 500 members of the public and 200 young people engaged and inspired</p> <p>Promotion of the Tame Way long distance footpath and creation of 5 new circular walks, a phone app and a new interactive website</p> <p>Delivery of 150 taster days and events and activities where 1,000 people will learn about their local heritage</p> <p>65 local people formally trained, gaining accreditation through OCN and City and Guilds qualifications (plus one, two-year apprentice position)</p>	<p>Lead Partner: Warwickshire Wildlife Trust</p> <p>Board and Delivery Partners: Canal Rivers Trust, Environment Agency, North Warwickshire Borough Council, Royal Society for the Protection of Birds, Staffordshire Wildlife Trust, Warwickshire County Council, Warwickshire Wildlife Trust</p>	Other	£2,500,000	£1,700,000 (from the Heritage Lottery Fund)	2015-2019	<p><b>Heritage Lottery Fund grant:</b> = £1,719,600</p> <p><b>In-kind support:</b> = £131,700</p> <p><b>Volunteer time:</b> = £191,300</p> <p><b>Match funding:</b> = £487,799</p> <p>Including funding from the Environment Agency (Water Framework Directive), TBC (Section 106 money), Warwickshire County Council, small charitable trust grants and larger grants from funders such as through the landfill communities fund</p>	<p>See <a href="http://www.discovertamevalley.com">www.discovertamevalley.com</a> for more information and to view / download a copy of the TVWLPS Landscape Conservation Action Plan, which explains the scheme, its projects and its costs in more detail</p> <p><b>Wider Partners:</b> -Birmingham and the Black Country Wildlife Trust, Curdworth Parish Council, Heart of England Community Foundation, Lea Marston Parish Council, Natural England, North Warwickshire Volunteer Centre, Severn Trent Water, SCC, TBC, West Midland Bird Club, Woodland Trust</p>
<b>Open Space</b>										
Provision and Enhancement of Parks	SP6 SP7 SP8	Wigginton Park – Enhanced Facilities	Tree trail with rubbings, wildflower meadow, fruit trees and interpretation and enhanced or new path infrastructure	Tamworth Borough Council	Other	£150,000 path infrastructure £50,000 other measures	S106 £46,075	2015-2019	Developer Contributions, TBC	
		New Park in East of Borough	Provision of a new park or enhancement of existing open space to designate a new park with informal recreational facilities and biodiversity features	Tamworth Borough Council	Other	Unknown		2020-2031	Developer Contributions, TBC	Could be delivered on Golf Course Site
Establishment and Enhancement of Local Nature Reserves (LNRs)	SP7 SP8	Broad Meadow – Establish LNR	<p>The creation of a new structure suitable for maintenance access to the site;</p> <p>The removal of redundant infrastructure from the site (concrete hard standing and pipe work on parts of the site);</p> <p>The improvement of the entrance area by the weir for both aesthetic and conservation value;</p> <p>Creation of site based interpretation (boards and a leaflet);</p> <p>A programme of local community engagement including work with schools and the setting up of a 'friends of' community group;</p> <p>River bank re-profiling;</p> <p>The creation of a network of scrapes and ponds;</p> <p>Conservation management of grassland with potential grazing;</p> <p>Management of trees and scrub on site;</p>	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council,	Other	<p>£150,000 access and removal of redundant infrastructure</p> <p>£5,000 entrance area</p> <p>£5,000 interpretation</p> <p>£160,000 management (2015-2031)</p>	<p>S106 £140,468</p> <p>Derbyshire Environmental Trust £25,000</p> <p>High Level Stewardship £35,000 (2014-2029)</p>	2015-2019 2020-2031	Wild About Tamworth, Developer Contributions, TBC, High level stewardship funding, Derbyshire Environmental Trust	

Green Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Lead and Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
		Tameside – Establish LNR	Increased semi-natural habitats; Increased management to support biodiversity	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council, Tame Valley Wetlands Partnership	Other	£200,000 River bank profiling funded by Environment Agency and Tame Valley Wetlands Partnership	S106 £28,818 High Level Stewardship £8,000 (2015-2031)	2015-2019 2020-2031	Wild About Tamworth, Developer Contributions, TBC, High level stewardship funding, Environment Agency and Tame Valley Wetlands Partnership (river bank)	
		Kettlebrook – Enhance LNR	Footpath, access improvements, facility improvements (including bins, benches, dog bins, interpretation, signage), lighting	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council	Other	£250,000	S106 £68,942 High Level Stewardship £8,000 (2015-2031)	2015-2019 2020-2031	Wild About Tamworth, Developer Contributions, TBC, High level stewardship funding	Quarry Hill – entrance and interpretation
		Dosthill Park – Enhance LNR	Improvement and enhancement of all the habitats on the site; Improved access and interpretation in order that local people might make greater use of the area	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council	Other	£50,000	S106 £9,817 High Level Stewardship £8,000 (2015-2031)	2015-2019 2020-2031	Wild About Tamworth, Developer Contributions, TBC, High level stewardship funding	
		Warwickshire Moor – Enhance LNR	Boardwalk improvements and extension to improve access to semi-natural habitats	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council	Other	£250,000	S106 £25,228	2015-2019 2020-2031	Wild About Tamworth Developer Contributions TBC High level stewardship funding	
		Hodge Lane – Enhance LNR	Improvements to biodiversity of the site and seeking to deliver local and UK Biodiversity Action Plan targets for associated habitats and species; Improved public access into and around the site; Awareness raising about nature conservation to local people and encourage their involvement in protecting and managing the site.	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council	Other	£50,000	S106 £2,337 High Level Stewardship £8,000 (2015-2031)	2015-2019 2020-2031	Wild About Tamworth, Developer Contributions, TBC, High level stewardship funding	
		Town Wall – Establish and Enhance LNR	Improvement and enhancement of all the habitats on the site; Improved access and interpretation in order that local people might make greater use of the area	Wild About Tamworth, Staffordshire Wildlife Trust, Tamworth Borough Council	Other	£50,000	High Level Stewardship £8,000 (2015-2031)	2015-2019 2020-2031	Wild About Tamworth, Developer Contributions, TBC, High level stewardship funding	Site in administrative process to be designated
<b>Recreational Open Space</b>	SP6 SP7 SP8	Off-site maintenance and improvement of existing recreational open space	Recreational open space management and enhancement of facilities to improve quality of existing: Urban parks Amenity open space Cemeteries Natural/semi-natural green space Civic Space	TBC	Other	Unknown		2015-2019 2020-2031	Developer Contributions	
<b>Play and Recreation Facilities</b>										
<b>Play Spaces</b>	SP6 SP7	County Drive Area	New small play area and equipment to increase access to play facilities	Tamworth Borough Council	Other	£50,000		2015-2019 2020-2031	Developer Contributions	

Green Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Lead and Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
		Pennine Way	New small play area and equipment to increase access to play facilities	Tamworth Borough Council	Other	Unknown	Secured by planning permission	2015-2019	Developer Provision under existing S106	
		Tame Valley Alloys / Peel Heights	New small play area and equipment to increase access to play facilities	Tamworth Borough Council	Other	Unknown	Secured by planning permission	2015-2019	Developer Provision under existing S106	Open space not adopted by council yet but play area proposed when it is
		Former Doulton Works, Marlborough Way	New small play area and equipment to increase to play facilities	Tamworth Borough Council	Other	Unknown	Secured by planning permission	2015-2019	Developer Provision under existing S106	
		Anker Valley Site	New medium play area and equipment to serve urban extension	Tamworth Borough Council	Other	Unknown	Will be secured if planning permission granted for current application	2015-2019	Developer Provision under S106	
		Dunstall Lane Site	New medium play area and equipment to serve urban extension	Tamworth Borough Council	Other	£150,000		2020-2031	Developer Contributions	
		Golf Course Site	New large play area and equipment to serve urban extension	Tamworth Borough Council	Other	£250,000		2020-2031	Developer Contributions	
		Maintenance and Replacement of Existing Play Facilities	Replacement of equipment at end of life to maintain existing access levels and quality of play facilities	Tamworth Borough Council	Other	Unknown		2020-2031	Developer Contributions	

Social and Community Infrastructure Required	Strategic Spatial Priorities	Scheme	Outcome	Lead and Delivery Agencies	Priority for Planned Development	Cost	Existing Funding	Phasing	Funding Provision	Notes
<b>Sport and Culture</b>										
<b>Sport and Leisure</b>	SP4 SP6 SP7	Multi-Purpose Community Use Leisure Centre	25x12m swimming pool, teaching pool, minimum of a 4 court sports hall and health and fitness gym with a minimum of 70 workstations to meet shortfall in provision	Tamworth Borough Council, Staffordshire County Council	Other	£10,000,000	£2,000,000 Sport England (potential, not yet secured)	2015-2019 2020-2031	TBC SCC Sport England	
		2 Multi-Use Games Areas in Sports Strategy West Analysis Area	Improved access to meet shortfall in provision	Tamworth Borough Council	Other	£200,000		2015-2019	TBC Developer Contributions	
		Bowling Green Provision in South of Borough	New facility to meet shortfall in provision	Tamworth Borough Council	Other	Unknown		2015-2019	TBC Developer Contributions	
		Tennis Court Provision	New courts to meet shortfall in provision	Tamworth Borough Council	Other	Unknown		2015-2019 2020-2031	TBC Developer Contributions	Prioritise south of the borough
<b>Culture</b>	SP2 SP4 SP9	Assembly Rooms Enhancement	Refurbishment and expansion to increase visitor numbers to town centre	Tamworth Borough Council	Other	£2.5m	£400,000 TBC £900,000 Heritage Lottery Fund (not yet secured)	2015-2019	Heritage Lottery Fund Arts Council Single Local Growth Fund TBC (£400,000)	
		Castle – Mercian Trail	Refurbishment to enable display of Staffordshire Hoard and increase visitor numbers to town centre	Tamworth Borough Council	Other	£350,000		2015-2019	TBC Bids for funding	
<b>Education</b>										
<b>Primary</b>	SP4 SP6	New Primary School to serve North of Tamworth (SCC Education Area 5)	Provide places for future population and to serve new homes	Staffordshire County Council, Developer	Essential	£4,000,000 2 Ha Land		2015-2019	Developer Contributions	
		New Primary school at Dunstall Lane	Provide places for future population and to serve new homes	Staffordshire County Council, Developer	Essential	£4,000,000 2 Ha Land		2015-2019	Developer Contributions	
		New Primary School at Golf Course	Provide places for future population and to serve new homes	Staffordshire County Council, Developer	Essential	£6,500,000 3 Ha Land		2015-2019	Developer Contributions	
		Extensions to Existing Schools	Provide places for future population and to serve new homes	Staffordshire County Council,	Essential	Unknown		2015-2019 2020-2031	Developer Contributions may be required where roll numbers increase as result of development	Depending on scale, location and timing of new development
<b>Secondary</b>	SP4 SP6	Extensions to Existing Schools	Provide places for future population and to serve new homes	Staffordshire County Council	Essential	Unknown		2015-2019 2020-2031	Developer Contributions may be required where roll numbers increase as result of development	Depending on scale, location and timing of new development
<b>Further and Higher</b>	SP4 SP6	Extensions to Existing Schools	Provide places for future population and to serve new homes	Staffordshire County Council	Essential	Unknown		2015-2019 2020-2031	Developer Contributions may be required where roll numbers increase as result of development	Depending on scale, location and timing of new development
<b>Employment</b>										
<b>Start Up and Social Enterprise Facilities</b>	SP3	Business Incubation Units and Meeting Space as Part of Creative Quarter	Business incubation units, meeting and conference space to provide a stable and nurturing environment with office facilities for start up businesses and social enterprises.	Local Enterprise Partnership, Tamworth Borough Council	Other	£500,000 - £1,000,000 depending on scale		2015-2019	Single Local Growth Fund	

Infrastructure Category	Known Essential Infrastructure Costs	Essential Costs in First 5 Years (2015-2019)	Other Infrastructure costs	Other Costs in First 5 Years (2015-2019)
Transport	£2,500,000	£2,500,000	£38,532,556	£37,682,556
Public Realm			£700,000	£350,000
Water and Drainage				
Strategic Green Infrastructure			£3,680,000	£2,990,000
Open Space			£1,370,000	£835,000
Play and Recreation Facilities			£450,000	£25,000
Sport and Culture			£13,050,000	£8,050,000
Education	£14,500,000	£14,500,000		
Employment			£1,000,000	£1,000,000
<b>TOTAL</b>	<b>£17,000,000</b>	<b>£17,000,000</b>	<b>£58,782,556</b>	<b>£50,932,556</b>

Cost and Potential Funding Streams	Value	Value in First 5 Years (2015-2019)
Known infrastructure costs	£75,782,556	£67,932,556
Secured funding	£23,355,685	£23,382,217
<b>Funding Gap</b>	<b>£52,426,871</b>	<b>£44,550,339</b>
Anticipated S106 funding	£16,200,000.00	£16,200,000.00
Anticipated CIL funding	£2,831,771.25	£1,911,295.75
<b>Residual Funding Gap</b>	<b>£33,395,100</b>	<b>£26,439,043.25</b>

# Tamworth Borough Council Community Infrastructure Levy

## Draft Regulation 123 List

October 2014

The Ventura Park/Town Centre/Rail Station Corridor Local Transport Package	
Borough wide cycle network extension and improvement	
Enhanced management, access and interpretation of Birmingham and Fazeley and Coventry Canals	
Improved signage to Town Centre Car Parks	
Town Centre Public Realm Enhancements Focusing on Key Gateways and Corridors	
Gateways:	Corridors:
College Campus	Upper Gungate
Train Station	Victoria Road
South East	Bolebridge Street
Ladybridge	Ladybridge
Lichfield Street	Lichfield Street
Employment Area Renewal	
Flood defence and drainage infrastructure maintenance	
Exploring Tamworth - Three successively wider circular routes incorporating existing footpaths or bridleways that permeate town and pass through open countryside with the emphasis on exploring Tamworth's wider green infrastructure network.	
Central Rivers Initiative projects identified in Tamworth	
Tame Valley Wetlands Partnership	
Enhanced facilities at Wigginton Park	
Enhancement of Local Nature Reserves	
Off-site maintenance and improvement of existing recreational open space:	
Urban parks	
Amenity open space	
Cemeteries	
Natural/semi-natural green space	
Civic Space	
New play area in the County Drive area	
Maintenance and replacement of equipment at existing play spaces	
Multi-purpose community use leisure centre	
2 Multi-use games areas in Town Centre, Kettlebrook or County Drive areas	
Bowling green provision in south of Tamworth	
Tennis court provision	
Enhancement of Assembly Rooms	
Enhancement of Tamworth Castle	
Extension of existing schools in Tamworth	
Business Incubation Units in Tamworth Cultural Quarter	

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THURSDAY, 23 OCTOBER 2014

**REPORT OF THE PORTFOLIO HOLDER FOR ECONOMY AND EDUCATION****SOUTHERN STAFFORDSHIRE BUILDING CONTROL PARTNERSHIP AGREEMENT  
RENEWAL****EXEMPT INFORMATION****PURPOSE**

To inform Cabinet that the Building Control Partnership Agreement ends on the 1<sup>st</sup> January 2015 and to recommend renewing the current arrangements.

**RECOMMENDATIONS**

- 1) The Council enters into a long term agreement with South Staffs Council and Lichfield District Council to provide a shared building control service.**
- 2) The Solicitor of the Council and Head of Planning and Regeneration are delegated to finalise the Partnership Agreement.**

**EXECUTIVE SUMMARY**

Building standards ensure a built environment that is safe, healthy, accessible and environmentally sustainable. The minimum building standards are set out in the Building Regulations. Building Regulations are highly comprehensive, far reaching and cover all aspects of building design and construction. Local authorities have a statutory duty to enforce these standards.

The business case for entering into an expanded shared Building Control service with South Staffs Council and Lichfield District Council was considered in December 2011 and approval was granted to enter into the partnership initially from 1<sup>st</sup> January 2012 for a 3 year period. The current partnership agreement is due to finish on 1<sup>st</sup> January 2015. This expanded partnership developed from the original shared service between Lichfield and Tamworth Councils which began in April 2009.

The benefits of enlarging the partnership were considered to be building resilience and reducing costs both of which have been realised. The current direct cost to the Borough Council is £35,260 for the financial year 2014/15. The briefing paper at Appendix A provides an overview of the benefits of the partnership and a reflection on financial performance to date.

It is proposed to continue with the Partnership arrangements and amend the Agreement for a longer period of time but retain the clause with the option to give 12 months notice to leave the partnership.

**OPTIONS CONSIDERED**

- 1) Continue with the Partnership on a 3 year agreement
  - This would require renewal again in 3 years. The current agreement allows any

- one of the Partners to give 12 months written notice to leave the Partnership.
- 2) Continue with the Partnership on a longer term agreement
  - This would give greater certainty to the Partnership and the retention of the 12 months written notice to leave clause provides an option to leave if required.
- 3) Withdraw from the Partnership
  - This would increase costs to the Council.
  - Given the number of applications from Tamworth to the partnership this would require a small team and therefore there would be low resilience.

## RESOURCE IMPLICATIONS

There are no proposed increased in costs as a result of this report. Continuing with the Partnership will help to keep costs low.

## LEGAL/RISK IMPLICATIONS BACKGROUND

Description	Likelihood / impact	Status	Countermeasure
Fee Income is less than cost of providing the chargeable service.	Medium/High	Tolerable	<ul style="list-style-type: none"> <li>• Maintain market share</li> <li>• Control costs and monitor income closely</li> <li>• Variable costs where possible.</li> </ul>
Increase in non-chargeable costs	Medium/Medium	Tolerable	<ul style="list-style-type: none"> <li>• Monitor volumes and activity</li> <li>• Welcome new partners to gain economies of scale.</li> </ul>

## SUSTAINABILITY IMPLICATIONS

Building Regulations are a key factor in delivering a sustainable built environment. The Building Control Partnership will continue to work with the construction industry to ensure standards are achieved.

## BACKGROUND INFORMATION

### REPORT AUTHOR

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### LIST OF BACKGROUND PAPERS

Report to Cabinet, "Building Control Service", 17th December 2008  
 Report to Council, "Building Control Service", 24 February 2009  
 Report to Cabinet, "Building Control Partnership", 23rd November 2011  
 Report to Council, "Building Control Partnership", 13<sup>th</sup> December, 2011

### APPENDICES

A "Briefing Paper: Resilience delivered - Ready for growth !!!"

# BUILDING CONTROL SERVICES

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## Briefing Paper

Resilience delivered - Ready for growth !!!

February 2014

Southern Staffordshire Building Control Partnership  
Lichfield District Council  
District Council House,  
Frog Lane  
Lichfield WS13 6YZ

## Overview

- This briefing paper has been prepared for the Partnership Board. Periodic reports show that despite significant challenges all main business, operational, and quality objectives have been achieved.
- Since 2008 Building Regulation fee income has reduced by £2.6 million across the three councils due to a smaller construction market and increased competition driving down fees.
- The original Partnership formed in 2009 and became a tri-party partnership in January 2012. Partnership working has helped the partnership to manage a loss in fee income and other reduced funding estimated at £800K over 3 years.
- Each partner's expenditure on non-chargeable work has been reduced to £35K for 2014/15; The Staffordshire and Shropshire average is currently £103K.
- The Partnership is on target to deliver the chargeable work entirely from fee income and meet all its non-chargeable statutory obligations at the lowest cost possible.
- Business resilience is important and it is concluded that a larger business is more resilient and opportunities for expanding the Partnership are welcomed.

## Financial objectives and targets of the partnership

### Southern Staffordshire Building Control Partnership

The chargeable service must be fully funded from fee income and that income is invested in the service to ensure it is sustainable and remains at zero net cost to all councils.

- The main financial objective of the partnership is to **reduce cost** through economies of scale.
- Chargeable work to be delivered for **zero net cost**, funded entirely from fee income.
- Non-Chargeable work to be delivered at a cost to each partner of **£35K for 2014/15**.

## Income and Expenditure

### Assessing what expenditure might have been without the Partnership

It is clear that expenditure has been reduced through economies of scale and by restructuring. However, it is not known what each council's expenditure would have been without the Partnership. This has been assessed as follows:

- It is assumed expenditure would have equaled the last financial year's actual expenditure for each council prior to entering the Partnership.
- This does not include increased expenditure that would have occurred due to inflation, increased employer contributions, pay rises, etc.
- It does not take into account that savings may have been found in other ways.

This has the advantage that assumptions are based on actual income and actual costs that can be used for each partner. However, it is not within the scope of this document to comprehensively identify exact expenditure savings.

### Comment on actual income and expenditure

Income from Building Regulation applications has reduced by 47% (£2.6 million) across the three councils since 2007/8. The three main reasons for this are;

- Increased competition and new legislation has resulted in lower fees, particularly on larger projects.
- An overall reduction in the size of the local construction market.
- Market share has reduced by around 5% to 82%.

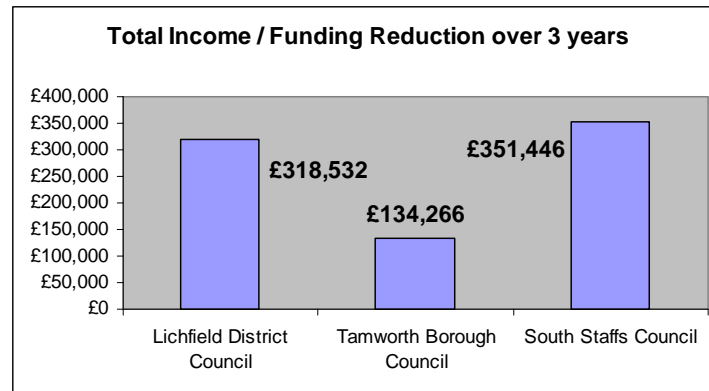
It has been necessary to restructure to reduce expenditure and these restructures have taken place. Reports for "Restructure 1" and "Restructure 2" were approved by the Partnership Board and are available on request.

### Overview of expenditure reduction

Building Control is no different than many other council services facing financial cuts. Reducing expenditure has been achieved by restructuring the service. The restructures have included staff reduction, re-engineering processes and reducing supplies and services. The main areas for reducing costs have been:

- Less Staff - around half the staff are now employed by the three councils in Building Control than at its peak in 2008.
- Lower operating costs- Smaller offices, etc.
- Reduced Supplies and Services Costs
- Reduced mileage and travel costs.

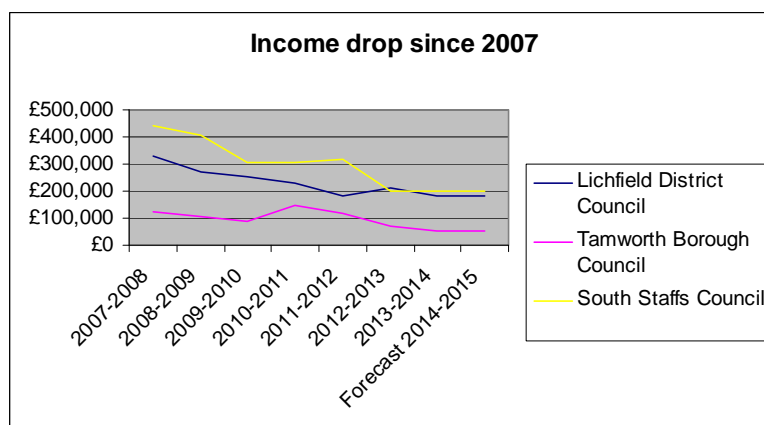
## Income / funding Reduction - January 2012 to April 2015



This chart shows that over the period of the current three year partnership, total income will have been reduced by over £800,000.

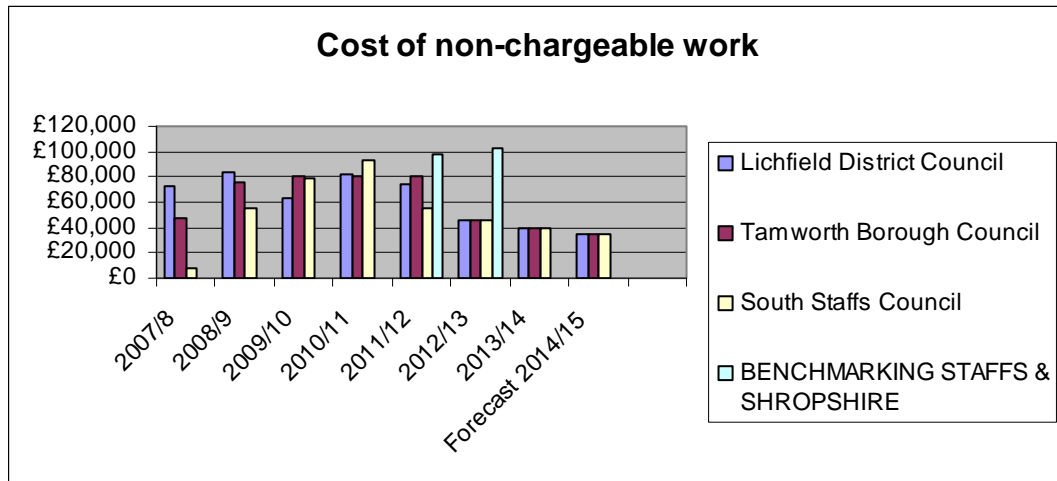
- The chart also identifies the distribution of the reduced income / funding and where expenditure has been reduced. The main drivers for expenditure reduction are to adjust to reduced income levels and reduced funding for non-chargeable work.
- South Staffs figures are based on actual expenditure for 2010/11. Savings were already in place between April and December 2011 in preparation for the Partnership. However, the whole reduction in expenditure has been credited to partnership working.
- Lichfield and Tamworth figures are based on actual expenditure in 2009, prior to the shared service.

## Fee income reduction since 2007/8



- This chart shows how overall income has dropped by 47% since a peak in 2007/8, and is now expected to plateau or rise slightly next year as confidence returns to the market. Fee income has been £2.6 Million less than if it had been maintained at 2007/8 levels.

## Non-Chargeable expenditure since 2007/8



- These costs are funded directly by each council.
- These are the lowest fees in recent financial benchmarking history. The cost to each council is £40,200, reducing to £35,200 next year. The average across Staffordshire and Shropshire in 2012/13 was £103,000 per council area, the highest being £190K.

### Effect of expenditure reduction on the Partnership

The Partnership has dealt with significant financial challenges and all operational and financial objectives are being achieved without increasing fees, whilst maintaining a good market share. However, there are three areas the Partnership needs to monitor to ensure the business remains sustainable.

1. The Partnership has a reduced capacity to invest in growth. Flexible working arrangements become less reliable as construction activity increases and demand for staff increases.
2. Should income fall significantly there is less opportunity to reduce costs further.
3. Non-chargeable costs may increase in the future.

## Conclusions

- The partnership was created to enable the service to be resilient and adapt to the new economic climate. One objective was to ensure clear financial objectives were set and achieved. This has been successful, with all financial and operational objectives of the partnership achieved.
- This briefing paper has attempted to put a financial figure on the benefit of the partnership. It is estimated, based on actual previous income and expenditure that over the period of this partnership £800K of funding has been lost due to the economic crisis. Most of this is fee income that is simply lost as projects were not built. The partnership has maintained good quality services, without fee increases and fully adapted to the smaller market without any financial burden on the councils.
- At a net cost of only £35K per council, the Building Control Partnership is by far the lowest cost Building Control service in Staffordshire and Shropshire.
- Resilience and flexibility is important to enable the Partnership to deal with future growth or reduced in income. Investigation should be carried out to find opportunities for further expansion of the Partnership to increase business resilience.
- It may be of interest to other councils who may be considering sharing services that we are ready for growth.