

To Members of the Cabinet Executive

Councillor E.F. White (Leader)	–	Leader of the Council
Councillor J.O. Hudson (Deputy Leader)	–	Finance and Efficiency
Councillor D.R. Clements	–	Customer Focus and Performance
Councillor J.A. Dickinson	–	Growth, Development and Assets
Councillor F.G.H Jackson	–	Sustainable Environments
Councillor G.Sanders	–	Health & Community Services
Councillor E.A. Webster-Williams	–	Community Partnerships & Engagement

Dear Councillor,

A meeting of the **CABINET EXECUTIVE** will be held in the Brooks Room at these offices on **MONDAY, 1 DECEMBER 2008 at 4.30 p.m.** for the transaction of the following business and your attendance is requested.

Yours faithfully

Liz Read
Democratic Services Manager

AGENDA

1. Apologies for Absence
2. Disclosure of Interests from Members
To receive disclosures of interests from Members (i.e. the existence and the nature of those interests in respect of items on this agenda).
3. Minutes (Pages 1 - 8)
To approve and sign the minutes of the meeting held on 03 November 2008 (enclosed).



4. Public Speaking Protocol
Requests received by the Protocol deadline to be reported by the Head of Administration and Legal Services with details of the Agenda Item to which they relate. (Such persons entitled to use the Protocol attend for the purpose of making representations, answering questions or giving evidence relating to the business of the meeting and the time allocated to each person is a maximum of three minutes unless extended at the discretion of the Chairman).
5. Electoral Services Provision (Pages 9 - 14)
To consider the report of the Director of Performance & People and the Democratic Services Manager (enclosed).
6. Implementation of Equality and Diversity Policy and associated Statutory Schemes - Progress Report (Pages 15 - 32)
To consider the report of the Director of Performance & People (enclosed).
7. Council Tax Base Setting - 2009/2010 (Pages 33 - 40)
To consider the report of the Financial Services Group Manager (enclosed).
8. Corporate Charging Policy (Pages 41 - 54)
To consider the report of the Financial Services Group Manager (enclosed).
9. Charging for Planning Advice (Pages 55 - 60)
To consider the report of the Development & Conservation Manager (enclosed).
10. Blaby Town Centre Masterplan (Pages 61 - 84)
To consider the report of the Corporate Head of Policy & Partnerships (enclosed).
11. Blaby District Local Development Framework Annual Monitoring Report (Pages 85 - 134)
To consider the report of the Corporate Head of Policy & Partnerships (enclosed).
12. Hinckley & Bosworth Borough Council Local Development Framework Core Strategy Proposed Submission Document (Pages 135 - 138)
To consider the report of the Corporate Head of Policy & Partnerships (enclosed).
13. Ageing Well Strategy (Pages 139 - 178)
To consider the report of the Corporate Head of Policy & Partnerships (enclosed).
14. Green Travel Plan (Pages 179 - 204)
To consider the report of the Environmental Protection Group Manager (enclosed).
15. Car Parking Arrangements in Narborough (Pages 205 - 212)
To consider the report of the Director of Operations and the Environmental Protection Group Manager (enclosed).
16. Access to Information Policy and Draft Publication Scheme under Freedom of Information (Pages 213 - 248)
To consider the report of the Legal Services Manager (enclosed).

17. Constitutional Amendments (Pages 249 - 252)
To consider the report of the Legal Services Manager (enclosed).
18. Data Quality Policy (Pages 253 - 262)
To consider the report of the Performance & Audit Manager (enclosed).
19. Business Development at the Pavilion (Pages 263 - 270)
To consider the report of the Pavilion Manager (enclosed).
20. Establishment Budget 08/09 - 09/10 (Pages 271 - 280)
To consider the report of the Director of Performance & People and the Financial Services Group Manager (enclosed).

NOTE :

The Forward Plan is sent out with this agenda as an information item and is also available on Blaby District Council's website (www.blaby.gov.uk).

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CABINET EXECUTIVE

Minutes of a meeting held at the Council Offices, Narborough

MONDAY, 3 NOVEMBER 2008

Present:

Councillor E.F. White (Leader of the Council) (Leader)
Councillor J.O. Hudson (Finance and Efficiency) (Deputy Leader)

Cllr. D.R. Clements	- Customer Focus and Performance
Cllr. J.A. Dickinson	- Growth, Development and Assets
Cllr. F.G.H. Jackson	- Sustainable Environments
Cllr. G. Sanders	- Health & Community Services
Cllr. E.A. Webster-Williams	- Community Partnerships & Engagement

Also in attendance as Observers:

Cllr. K.D. Coles
Cllr. D. Freer
Cllr. G.L. Welsh

Officers present:-

Mrs S. Whiles	- Chief Executive
Mr. J.L. Holden	- Deputy Chief Executive
Mr S. Beard	- Director of Operations
Mrs. J. Toman	- Director of Performance & People
Mrs. K. Johnston	- Head of Administration & Legal Services
Mrs. C. Proudfoot	- Health & Leisure Group Manager
Mr J. Wells	- Environmental Protection Group Manager
Mrs E.M. Read	- Democratic Services Manager
Mrs A. Moran	- Performance and Audit Manager
Mr. N. Cotter	- Pavilion Manager
Mr J. Adsley	- Locality Partnerships Co-ordinator
Ms. M. Ikin	- Senior Dog Warden
Mr M. Berry	- Democratic Services Officer
Mrs H. Pike	- Public Relations Officer

Apologies:

None.

272. DISCLOSURE OF INTERESTS FROM MEMBERS

- | | |
|-----------------------------|---|
| Cllr. E.F. White | - Agenda Item 8 |
| Nature of Interest | - Personal |
| Extent of Interest | - Member of Leicestershire County Council |
| Cllr. J.A. Dickinson | - Agenda Item 8 |
| Nature of Interest | - Personal |
| Extent of Interest | - Member of Leicestershire County Council |

273. MINUTES

The minutes of the meeting held on 6 October 2008, as circulated, were approved and signed as a correct record.

274. PUBLIC SPEAKING PROTOCOL

No requests were received.

275. URGENT ITEMS REPORTS

The Leader ruled that he would take the following reports:

1. Constitutional Amendments;
2. Completion of Housing Stock Transfer;

as Urgent Item reports following Agenda Item 10.

276. BUDGET ISSUES - 2008/2009

Considered – Report of the Deputy Chief Executive.

Other Options Considered – The Council has put in place a range of measures to enable in-year variances between forecast actual expenditure and available budgets to be addressed. To opt not to address such issues would not be in the best interests managing the Council's financial affairs.

DECISIONS

1. That the budget amendments set out in the report of the Deputy Chief Executive be approved.
2. That under the provisions of the policy and budgetary framework a contribution of £120,257 be made from the General Fund balances to meet the net additional costs identified for 2008/09 as set out in the report.

Reason:

The most recent information relating to actual expenditure during 2008/09 indicated that, in respect of the General Fund a) number of areas will exceed the current annual budget provisions b) a number of unforeseen one off expenditure items have arisen during the first six months of the financial year which require funding and c) income generation was below budget in a number of key areas - and that the established budget management arrangements be implemented to regularise the position.

277. QUARTER 2 PORTFOLIO PERFORMANCE REPORT - PORTFOLIO HOLDERS (JULY - SEPTEMBER 2008)

Considered – Report of the Director of Performance & People.

Other Options considered – None.

DECISIONS

1. That the quarterly portfolio performance reports (attached at Appendices 2a to 2g to the report of the Director of Performance & People) be noted.
2. That the Member Champions update reports (attached at Appendix 2h to the report of the Director of Performance & People) be noted.

Reason:

To enable the Cabinet to monitor performance throughout the organisation in order to focus on the rate of improvement. It is important that areas of good performance are recognised and those which require further improvement are highlighted and appropriate action taken.

278. EMPLOYEE VOLUNTEERING SCHEME

Considered – Report of the Director of Performance & People.

Other Options Considered – None. This is seen as additional recruitment and retention benefit.

DECISIONS

1. That an employee volunteering scheme be developed and implemented for employees within the Council and that this scheme be administered by Voluntary Action Blaby District (VABD).
2. That any employee who volunteers for the scheme for at least 2 hours per month will receive an additional 2 hours of paid time off per month, ensuring that VABD benefit by at least 4 hours volunteering per month from each participant.

Reasons:

1. There are considerable benefits to offering an employee volunteering scheme. These are listed within the main body of the report of the Director of Performance & People.
2. VABD is one of our key partners within the community and has identified 3 schemes for volunteering which will support us in the delivery of our Corporate Priorities.

279. DEVELOPING INTEGRATED YOUTH SUPPORT SERVICES IN LEICESTERSHIRE - FINAL RECOMMENDATIONS.

Considered – Report of the Corporate Head of Policy & Partnerships (presented by Mr J. Adsley, Locality Partnerships Co-ordinator).

Other Options Considered – Local authorities are required to reconfigure and integrate their targeted support services for vulnerable young people and fulfilling their legal duty (Section 507B of the Education Act 1996) to secure young people's access to positive leisure time activities. On this basis there are no other options than to integrate youth support services.

DECISIONS

1. That the recommendations set out at Appendix 1 of the report of the Corporate Head of Policy & Partnerships be supported in principle, subject to recommendations 12 and 17 being given further consideration.
2. That the approach of working in partnership with Leicestershire County Council, on developing the Integrated Youth Support Service in the District, where it fits with the District Council's strategic aims in accordance with the Corporate Plan and Sustainable Community Strategy, be endorsed.

Reasons:

1. Youth Matters and Youth Matters: Next Steps described the Government's expectations of children's trusts to integrate their work around the needs of all young people to deliver a core local youth offer that includes:

- Improved information, advice and guidance (IAG) on education, careers and health
- Access to positive activities and personal development opportunities in leisure time
- More targeted support for those at risk of poor outcomes
- Opportunities for young people to volunteer, make a positive contribution and have a real voice in influencing provision

This necessitates local authorities reconfiguring and integrating their targeted support services for vulnerable young people and fulfilling their legal duty (Section 507B of the Education Act 1996) to secure young people's access to positive leisure time activities.

2. It is important to recognise that a number of specific statutory duties underpin the guidance on development of Integrated Youth Support Service developments. These include:
 - To co-operate to improve the wellbeing of children and young people (Section 10, Children Act 2004).

- To safeguard and promote the welfare of children and young people (Section 11, Children Act 2004).

280. CCTV POLICY

Considered – Report of the Environmental Protection Group Manager.

Not to introduce a Policy – this is disregarded as failure to provide a Policy could lead the Council open to public scrutiny, possible reputation damage and non compliance with DPA.

DECISIONS

1. That the draft CCTV Policy (including a fee of £25 for access to information) attached at Appendix 1 to the report of the Environmental Protection Group Manager be approved for general consultation and that a final report be produced to present to Cabinet Executive at its meeting to be held on 5 January 2009.
2. That subject to approval of the CCTV Policy, a compliance audit for assessing the Council's existing CCTV systems be commissioned.
3. That any recommended work be carried out, having regard for the Policy and to reflect best practice requirements and current guidance.

Reasons:

1. To ensure the Council can demonstrate fulfilment of Data Protection Act 1998 requirements and adopt best practice on the use of CCTV surveillance systems as detailed in the Code of Practice. The Council is able to set a fee for access to information by the public.
2. The purpose of undertaking a compliance audit will ensure that the systems are being operated in such a way as to meet the stated objectives and rationale behind its installation, and that no individual or groups of individuals are being put at risk or prejudiced. It will also ensure the Council's existing CCTV systems are compliant with the Code of Practice.

281. CLEAN NEIGHBOURHOODS & ENVIRONMENT ACT 2005 DOG CONTROL ORDERS.

Considered – Report of the Health & Leisure Group Manager.

Other Options Considered – None.

The Health & Leisure Group Manager made reference to the comments made during the Public Consultation period in respect of enclosed children's play areas and marked sports pitches as detailed in the previous version of the Dogs Exclusion (Blaby) Order.

RECOMMENDATION TO COUNCIL

That the following dog control Orders be adopted:-

- The Fouling of Land by Dogs (Blaby) Order 2008;
- The Dogs on Leads by Direction (Blaby) Order 2008;
- The Dogs Exclusion (Blaby) Order 2008;

Reasons:

1. Dog Control Orders made under the Clean Neighbourhoods and Environment Act 2005 will give the Dog Wardens greater powers to resolve many dog related issues. They are a very effective and efficient way to resolve less serious incidents by way of issuing Fixed Penalty Notices
2. Following Public Consultation the Dog exclusion order has been amended to cover enclosed children's play areas only and marked sports pitches have been removed from this order. The Dog Wardens will work locally with Parish Councils where they have specific problems with sports pitches under the Clean Neighbourhoods and Environment Act 2005 rather than a blanket approach. This amendment has been made as a result of the formal consideration of the representations received during the Public Consultation process and having regard to locality issues.

282. URGENT ITEM REPORT - CONSTITUTIONAL AMENDMENTS

Considered – Report of the Head of Administration & Legal Services.

Other Options Considered – None.

RECOMMENDATION TO COUNCIL

That the amendments to the Constitution detailed at Appendix A to the report of the Head of Administration & Legal Services be approved and adopted.

Reason:

Due to the timing of relevant Statutory regulations coming into force, it is impracticable to delay the approval and adoption of these Constitutional amendments until the next meeting of the Cabinet Executive.

283. URGENT ITEM REPORT - COMPLETION OF HOUSING STOCK TRANSFER

Considered – Report of the Chief Executive.

Other Options Considered – As previously reported.

The Chief Executive thanked relevant Officers for their involvement and hard work during the housing stock transfer process.

The Leader, on behalf of the Cabinet Executive thanked the Chief Executive and all relevant Officers for their achievements during the housing stock transfer process.

DECISIONS

1. That the transfer on 03 November 2008 of Blaby District Council's Housing Stock to Three Oaks Homes be noted.
2. That all Members of Council be advised of the completion of the Housing Stock Transfer process with the transfer of the Council's Housing Stock to Three Oaks Homes.

Reason:

To report the transfer of the Council's Housing Stock to Three Oaks Homes promptly and formally.

THE MEETING CONCLUDED AT 6.09 P.M.

BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	1 December 2008
Subject:	Electoral Services Provision
Report of:	Director of People & Performance and Democratic Services Manager
Status:	Public

1. Purpose of Report

1.1 To increase resilience within the Electoral Services team.

2.	<u>Recommendation</u>
2.1	That a new post of Electoral Services Officer be created within the Democratic Services Team
2.2	That the post of Electoral Services Officer be designated Politically restricted in accordance with the Local Government and Housing Act 1989 as it is responsible for advising candidates, agents and elected members on electoral matters.
3.	<u>Reason for Decision Recommended</u>
3.1	It is appropriate that the Council is structured in a manner which ensures that it can meet its statutory responsibilities.

4. Forward Plan

4.1 Forward Plan Reference Number: 10/08(53).

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 Recent resignations have resulted in there being a skills gap in relation to elections and electoral registration. Overall responsibility for the administration of Elections lies with the Democratic Services Manager but this employee is currently the only Officer within the Council to have Election and Electoral Registration experience and knowledge which leaves the organisation in a vulnerable position, additionally there is no room for succession planning in the current structure. It is therefore recommended that the structure of Democratic Services be amended to include a post of Electoral Services Officer.

7. Other Relevant Considerations

7.1 All issues contained in paragraph 6.

8. Other Options Considered

8.1 Not to create a post – not an option as this would leave the Council in a vulnerable position as stated in paragraph 6.

9. Appropriate Consultations

9.1 Employees within the Democratic Services section and the appropriate trade union.

10. Financial and Efficiency Implications

10.1 The proposed post has been through the job evaluation process and has been evaluated at a scale 5. Funding for this post will be met within existing Establishment budgets for the Performance & People Directorate

11. Appendix to this report

11.1 Proposed job description for the post of Electoral Services Officer.

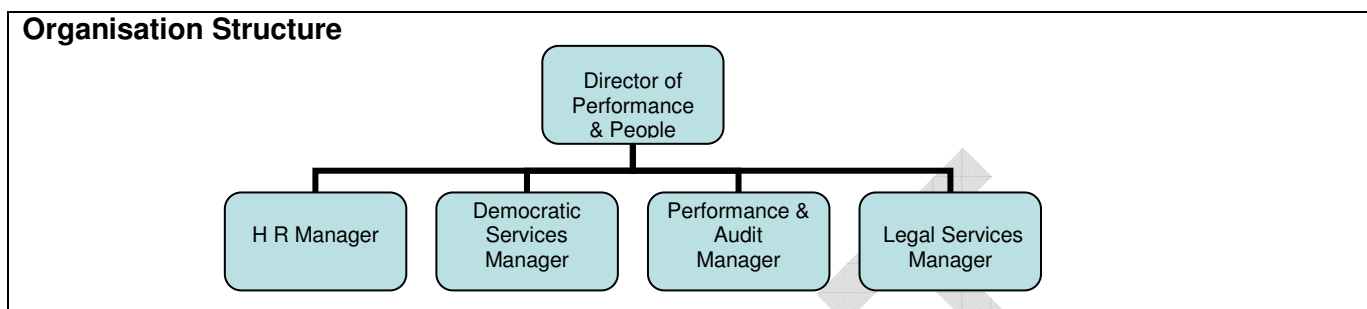
12. List of Background Papers

12.1 None

The following Officers/Members have been consulted (identified by ✓):

- Head of Paid Service** (Chief Executive)
- S. 151 Officer** (Deputy Chief Executive)
- ✓ **Monitoring Officer** (Legal Services Manager)
- ✓ **Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

Post Title:	Electoral Services Officer
Post Number:	
Reports to:	Democratic Services Manager
Scale:	5
CRB:	



Overall Purpose

- To assist in the production and maintenance of the Register of Electors for the Blaby District on behalf of the Electoral Registration Officer and the administration of the Local Government, Parliamentary, European Parliamentary and other relevant Elections in the same area on behalf of the Returning Officer.

Overall Purpose of Job

- To provide and improve the delivery functions of:
 - Elections
 - Electoral Register

- Guiding Organisational Principles**
- Leading “Brilliantly”
 - Being accountable
 - Being in the work
 - Doing what matters for the customer
 - Doing what matters for staff
 - Designing against demand
 - Doing Value work
 - Reducing Waste
 - Ambition for the Council
 - Determination to succeed

Key Roles, Tasks and Responsibilities	
1.	To assist with specific activities in the preparation and publication of the annual Register of Electors, monthly rolling registration procedures and absent voters, overseas electors and other special category electors lists in accordance with statutory procedures and deadlines including: <ol style="list-style-type: none"> Recruitment, training and supervision of temporary staff in connection with electoral registration duties, including suggesting appropriate rates of pay and arranging payment of staff; Procuring printing requirements in connection with the annual canvass; Liaising with county, district and parish councillors in relation to the supply of registers and other permitted data; Maintaining system and procedures to monitor and report on the performance of the electoral registration service;

	e) Completion of local and national performance indicators, statistical and financial returns.
2.	To contribute towards the organisation of European Parliamentary, Parliamentary, Local elections and referenda on behalf of the Returning Officer and to be responsible for specific activities in the planning and conduct including: <ul style="list-style-type: none"> a) appointment and training of staff engaged in elections eg Presiding Officers, Poll Clerks, Clerks at the Issue and Opening of Postal Votes and the Count; b) Ensuring availability of polling stations and identifying and securing alternatives where not available; c) Liaison with election agents and candidates where required, including the provision of nomination documentation, candidates' and agents guidance and notices; d) Arrange delivery/collection of polling booths to and from Polling Stations; e) Obtaining quotations for printing requirements in connection with elections, including ballot papers, postal votes and poll cards and other election equipment; f) Preparing ballot boxes including postal voters' ballot boxes; g) Ensuring statutory notices and documents associated with an election eg Notice of Election, Notice of Poll, poll cards etc are printed and published in accordance with regulations. h) Completion of local and national performance indicators, statistical and financial returns.
3.	To supervise the Electoral Services Team.
4.	To assist with Budgetary control and spending on electoral registration and elections.
5.	To manage the eXpress Electoral Administration System including dealing with ICT in relation to system upgrades, monitoring the effectiveness of the system including system support and making recommendations, where appropriate, for change.
6.	To assist in the implementation, monitoring and maintenance of initiatives to raise awareness of registration and participation.
7.	To maintain knowledge of all relevant legislation and rules in respect of all electoral matters, and assist with the implementation.
8.	To co-ordinate the four yearly reviews of polling districts and polling places in accordance with the Electoral Administration Act 2006 and assist with the preparation of the appropriate reports.
9.	To co-ordinate community governance reviews, including arrangements for public consultation, evaluating responses and drafting proposals for consideration by the Council in conjunction with the Democratic Services Manager.
10.	In conjunction with the Democratic Services manager draft proposals and provide statistical information in response to Periodic Electoral Reviews and Parliamentary Constituency reviews undertaken from time to time by the Electoral or other relevant Commission for consideration by the Council.
11.	To liaise with outside agencies, organisations and other local authority officers in respect of electoral matters.

	Behavioural Competencies	Level
A.	Strategic Focus	1
B.	Communicates	3
C.	Does the Job Well	3
D.	Leadership	2
E.	Works with others	2
E.	Customer Focus	3
G.	Political Awareness	2
H.	Develops Talent	2
I.	Manages change	1
J.	Improves performance and teams	2

Post Characteristics	
Qualifications, essential experience	HNC/A Levels/NVQ3 standard or equivalent, Hold or prepared to study for AEA Qualification
Allowances	None
On call/emergency situations	None
Politically restricted posts	Yes

Health and Safety Responsibilities -	
	Health and Safety responsibility is inherent in the managerial role and the responsibilities for health and safety are no different from the requirements of other management activities: To be familiar with and at all times comply with:
1.	<ul style="list-style-type: none"> • the Council's general health and safety policy, • the Council's specific health & safety policies and procedures as detailed in the Council health and safety policy documents, and • local department specific health and safety procedures as amended or added to from time to time.
2.	To be responsible for the effective implementation of the Council's Health and Safety Policy and procedures within their Services and report any corporate or significant issues to Director of Operations as the lead officer on Corporate HSW
3.	Further Health & Safety information related to this post will form part of your Contract of Employment

Emergency Planning/Response Responsibilities	
	To carry out the duties specified in relation to the post in the Emergency Plan, Business Continuity Plans and other associated documents

Job Description Details	
Reviewed by:	Liz Read
Approved by:	Jane Toman
Evaluated:	11 November 2008
Latest Version Date:	8 November 2008

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet
Date:	01 December 2008
Subject:	Implementation of Equality and Diversity Policy and associated Statutory Schemes – Progress Report
Report of:	Director of Performance and People
Status:	Public

1. Purpose of Report

This report summarises the progress made in implementing the Council's Corporate Equality and Diversity Policy, and three associated statutory schemes, comprising of the Disability, Gender and Race Equality Schemes. Issues arising and equality priorities for 2009 are also identified.

2.	<u>Recommendations</u>
2.1	That the progress made, and issues arising, in implementing the Action Plans of the Corporate Equality and Diversity Policy, Disability Equality Scheme, Gender Equality Scheme and Race Equality Scheme be noted.
2.2	That the Council's equality priorities for 2009 be noted.
3.	<u>Reason for Decisions Recommended</u>
3.1	These four policies and their associated Action Plans were adopted between October 2006 and December 2007 and it is appropriate that progress in their implementation should now be reviewed as part of the ongoing monitoring of the Council's equalities agenda.

4. Forward Plan

4.1 Forward Plan Reference Number: 06/08(012).

5. Key Decision

5.1 No.

6. Matters for Consideration

6.1 Background

The equalities agenda for public bodies covering both employment and service delivery has expanded significantly in the last few years to include new statutory duties in the areas of disability, age and gender. Meeting it requires sustained corporate focus and action by the Council and the Corporate Equality and Diversity Policy, (CEDP), provides the overarching framework within which this can be achieved. This Policy and its associated Action Plan was adopted at the Cabinet meeting of 13th October 2006.

More specific statutory equality schemes covering Disability, Gender and Race form part of the CEDP Action Plan and have subsequently been adopted by the Council in December 2006, April 2007 and December 2007 respectively. Each Scheme has its own separate Action Plan.

Taken together, these four complementary Action Plans cover in total the period from September 2006 to March 2010. This report reviews the progress made over the last year in implementing each Action Plan i.e. up to the end of October 2008.

This is the second such review, the first review covered the 12 month period to October 2007.

6.2 Corporate Equality and Diversity Policy

This present report forms part of the annual monitoring of the Council's Equality and Diversity Policy as part of the regular monitoring and reporting mechanisms which the Action Plan seeks to establish.

The Action Plan is attached as Appendix 1 with progress made under each Action set out in the right hand column headed 'Comments on Progress'.

The Appendix 1 Plan has been colour coded thus:

- ★ Actions shown in **GREEN** – completed
- ★ Actions shown in **YELLOW** – in progress
- ★ Actions shown in **RED** – not yet started (schedule slipped)
- ★ Actions NOT colour coded – originally scheduled later than October 2008

It can be seen that, out of the 25 actions originally scheduled for implementation in this period, 22 or 88%, have been completed, 1 is in progress and 2 have not yet started. One action scheduled for March 2009 has been achieved a year early.

In particular, good progress has been made on the four targets from the Action Plan, listed below, identified in the Policy (page 13) as priorities for achievement:

Top Equality Action Plan Targets (October 2006)

1. Devise and implement a Disability Equality Scheme from December 2006 – Statutory requirement to publish Scheme by 4 December 2006
2. Devise and implement a Gender Equality Action Plan from March 2007 – Statutory requirement to publish Scheme by beginning April 2007
3. Achieve Level 2 of the Equality Standard for Local Government (ESLG) by March 2008 (meeting our equality objectives). Progress towards Level 3 by March 2009. - No Statutory duty but is measured through the Best Value Performance Indicator 2a.
4. Update the Council's Race Equality Scheme (2002) by August 2007, and achieve substantial compliance with the race equality duty by March 2008. – Statutory requirement to review function and policy assessments every 3 years, Blaby District Council Race Equality Scheme states that the scheme itself will be reviewed after 3 years.

All four targets have now been fully met.

Some recent achievements include:

The programme of Equality Impact and Needs Assessments for both existing and new policies and services, with associated staff training, commenced in 2007/08, as detailed in Appendix 1. Although there were some delays in the implementation of this programme, it was a major contributing factor in the Council's achievement of the Equality Standard for Local Government target.

The target of 61% for compliance with the Race Equality duty was exceeded by achieving 78% a year earlier than scheduled.

Work is now being carried out by an officer group to share information across the Council as a move to ensure fair access to services for all and resource and learning is increased by the membership of the Leicestershire Equalities Forum which meets to share good practice and experience

In line with the commitment to monitor, review and update the Action Plan as appropriate two new actions were added (Appendix 1 - 1-07 & 2-07) in November 2007.

It should be noted that the Equality Standard for Local Government (ESLG) is being replaced in 2009 with the Equality Framework for Local Government (EFLG) which has three rather than five levels. The current Level 2 will be equivalent to the 'emerging' level of the new standard.

The new Equality Bill, which is in the Government's draft legislative programme for 2008/09, will bring together all equality strands within one piece of legislation.

6.3 Disability Equality Scheme

The Action Plan for this Scheme runs from December 2006 to December 2009.

Set out below are the main Actions scheduled up to October 2008 that have **NOT** yet been implemented :

- ★ Monitoring of service delivery by disability/diversity group
- ★ Review Equal Opportunities Policy
- ★ Review support for disabled employees
- ★ Increase participation of young disabled people in Youth Activities
- ★ Active involvement of local disabled people in development and implementation of Scheme.

6.4 Gender Equality Scheme

The Action Plan for this Scheme runs from April 2007 to March 2010.

Set out below are the main Actions scheduled up to October 2008 that have **NOT** been implemented :

- ★ Monitoring of service delivery by gender/diversity group
- ★ Development of flexible working policies
- ★ Equal Pay Review

6.5 Race Equality Scheme

The Action Plan for this Scheme runs from August 2007 to March 2010.

Set out below are the main Actions scheduled up to October 2008 that have **NOT** yet been implemented :

- ★ Monitoring of service delivery by ethnic/diversity group
- ★ Analyse workforce data to reveal any inequalities with respect to race and recommend any actions necessary to redress these
- ★ Incorporate Race (and other) equality objectives in service plans for 2008/09

6.6 Looking Forward

The Council's key equality priorities for 2009 will include::

- ★ Successfully establishing the reformed CEG to improve its effectiveness as the main corporate driver of the equalities agenda
- ★ Review the existing Equality and Diversity Policy Action Plan (January 2009)
- ★ Establish the systems required to commence the phased implementation of the monitoring of service delivery by diversity group.
- ★ Use analysis of INA results and other data in order to commence the setting of meaningful corporate equality objectives.
- ★ Consider the implications for the Council of the Single Equality Act
- ★ Make demonstrable progress towards the 'Achieving' level (2nd level out of 3) of the new Equality Framework for Local Government

6.7 Conclusion

Substantial progress has been made on the implementation of the Council's equalities agenda over the past year, in this second year round of

implementation and monitoring, with all three Equality Schemes now in place.

In particular, 2007/08 saw the commencement of the programme of equality Impact and Needs Assessments for both existing and new policies and services, with associated staff training.

Nevertheless, there has been some slippage in all three Scheme Action Plans, with a number of tasks scheduled for completion still outstanding. The one task common to all three is the monitoring of service delivery by diversity group. This is required so that any 'gaps' in service delivery can be identified and responded to, so that all groups within the District receive the same access to and standard of, service delivery. It is recognized that this is a key area for improvement and work has commenced to address this gap.

The equalities agenda for local government continues to develop apace and the current review of the Corporate Equalities Group and impending review of the Equality and Diversity Policy Action Plan will provide the opportunities to refocus the Council's equalities priorities for the next few years and this group will focus on embedding an Equalities culture throughout the organisation.

Whilst some of these are listed above, inevitably, new challenges and tasks will arise during this period.

A formal report on progress will be brought in a year's time, although this will be monitored more frequently than this via the Corporate Equalities and accessibility Group which meets regularly

7. Other Relevant Considerations

7.1 Equalities

No EINA is required for this report.

8. Other Options Considered

8.1 Not to report progress, but this would be at variance with the commitment to establish regular monitoring and reporting mechanisms made in the Equality and Diversity Policy Action Plan.

9. Appropriate Consultations

9.1 Internal consultation with appropriate officers.

10. Financial and Efficiency Implications

	Current year	2009/10	2010/11
Revenue	£10,000*	£10,000*	N/A
Capital	N/A	N/A	N/A

* Approved 2008/09 and provisional 2009/10 Budgets for Equalities work.

11. Appendix to this report

11.1 Corporate Equality and Diversity Policy Action Plan 2007-10 (Appendix 1).

12. List of Background Papers

12.1 Blaby District Council Corporate Equality and Diversity Policy: Adopted 13 October 2006.

12.2 Blaby District Council Corporate Equality and Diversity Action Plan.

12.3 Blaby District Council Disability Equality Scheme: Adopted 4th December 2006.

12.4 Blaby District Council Gender Equality Scheme: Adopted 27th April 2007.

12.5 Blaby District Council Race Equality Scheme: Adopted 6th December 2007.

The following Officer(s)/Member(s) have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Equality and Diversity Action Plan – Progress Report November 2008

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
1	Establish Corporate Equality Group (CEG)	Corporate Focus and Delivery mechanism established	Management Board / Performance Team	September 2006	October 2006	Non-Statutory	Established October 2006 – membership reviewed November 2008 to ensure continued effectiveness post restructure
2	Identify a corporate driver/champion for equalities.	Senior manager leading the equalities agenda across the Council	Management Board / Performance Team	October 2006		Non-Statutory	Director of People and Performance is Corporate Champion – chairs CEG. Member Portfolio holder is Customer Focus and Performance due to strong links with performance improvement.

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
3	Consider (additional) resource implications, to achieve the various statutory schemes is also required, including staffing, staff equalities training and specific budget requirements	Equalities agenda adequately resourced in order to meet requirements	Management Board / HR / Performance Team	October 2006	Ongoing annually	Non-Statutory	Provision of £10,000 in Performance budget to meet requirements of equalities agenda. Training will be ongoing requirement for new employees, to be met from corporate training budget.
24	Provide an equalities section on Council web site and intranet (ISIS).	Staff and public kept informed of equalities issues. Will form a part of the consultation mechanism	CEG / Performance Team / Web Administrator	Beg. October 2006		Non-Statutory	Section provided from October 2006 and updated as required
5	Meet requirements of Age regulations from 1 October 2006.	Legislation in relation to Age complied with.	HR	End September 2006		Statutory Employment Equality (Age) Regulations 2006	Requirements met
6	Adopt revised Equality Policy and Corporate Equality Plan	A Corporate Policy framework and action plan in place, driving statutory schemes	Performance Team / CEG	October 2006		Non-Statutory	Policy & action plan adopted & published October 2006

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
7	Develop suitable methods of involving and consulting with stakeholders.	Consultation mechanism in place to develop and inform all parts of equalities agenda	CEG / Customer Services / Performance Team	October 2006		Statutory DDA 2.(2) RRA 2.(2)(b)(i)	All three statutory equalities schemes have been subject to and informed by, consultation with residents, representative groups, staff & partners. Formal consultation strategy goes to Cabinet January 2009. Remit of reformed CEG being widened to include consultation.
8	Adopt Disability Equality Scheme (DES) and continue to make reasonable adjustments for disabled people to access services this standard.	Disability equality Scheme published. Equality of access continually developed.	CEG / Performance Team / All Services	4 December 2006		Statutory DDA 2005	Scheme & action plan adopted & published 4 December 2006.

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
9	Training of all Council staff in equalities and diversity	All staff aware of the requirements for the Council and employees in relation to equalities	HR / Training	First training session . December 2006. Ongoing programme		Statutory RRA 2.(2)(b)(v)	Initial overview training programme for all staff commenced June 2007 completed October 2007 All staff are trained on Equalities as part of the New Starter Process. Currently investigating joint training with other Leicestershire Councils.
10	Identify special training needs in relation to front line staff and provide training	Extra training supplied as required.	HR / Training	Training from March 2007.	Continuous	Non-Statutory	Follow up training for managers and those carrying out Impact and Needs Assessments (INA's) delivered
11	Publish employee monitoring reports with regard to race, disability, age and gender by end of 2006/07.	Profile of the workforce of the Council published on a regular basis.	HR	April 2007	June 2008	Statutory RRA 5.(3) DDA 2(3)(d)(i)	Mechanisms in place to record majority of this data. Updated employee numbers in Race Equality Scheme. Full data published as part of 2008 Annual Report.

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
12	Publish information gathered with regards to equalities	Consultation and information gathering exercises reported on and inform progress and future plans on equalities and diversity agenda	All Services	April 2007	Ongoing	Statutory DDA 2(3)(e)(i),(ii) RRA 2.(2)(b)(iii)	Consultation carried out in connection with the Council's statutory equalities schemes .
13	Adopt Action Plan for Gender Equality Duty by April 2007	Scheme published. Equality of access continually developed.	CEG / HR / Performance Team	April 2007		Statutory	Scheme & action plan adopted & published April 2007
14	Define approach to the method of carrying out Impact and Needs Assessments (INA's)	Methodology and criteria defined	CEG / Performance Team	April 2007	February 2008	Statutory RRA 2(3)(b)	Implemented in conjunction with external training provider & training of managers in March/April 2008. Subject to ongoing review & improvement
15	Prioritise policies and functions for INA	Prioritised against criteria	CEG / Performance Team	April 2007	October 2007	Statutory RRA 2(3)(b)	Council functions prioritised as part of revised Race Equality Scheme

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
16	Commence Impact and Needs Assessment (INA's) of policies and services in relation to race, disability, age and gender.	New and existing policies assessed for their impact on service users and staff and amendments made to compact unfair treatment.	CEG / All Services	April 2007	February 2008	Statutory DDA RRA	Prioritised programme in place for existing policies & services. New procedures in place for new policies & services
Page 17 Page 26	Implement a regular monitoring and reporting mechanism for equality action plans and ESLG self-assessment.	Regular data regarding progress against action plans recorded and reported to management and Members	CEG / Performance Team / HR	April 2007	Ongoing	Statutory DDA	Agreed reporting established from December 2007 to fit in with timescale of Equality & Diversity Policy Action Plan.
18	Complete the Updating of the 2002 Race Equality Scheme	Race Equality Scheme fit for purpose for the future.	CEG / Performance Team	August 2007	December 2007	Statutory RRA	Updated Scheme adopted and published December 2007.

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
19	Set Equality Objectives informed by INA	Further develop delivery of equalities agenda	CEG	September 2007	December 2009	Non-Statutory	Not done. Key Task for CEG in 2009. Requires data on service delivery. Actions from INA's to be included in Service Plans from 2009/10
Page 20 Page 27	Integrate equalities into service delivery and performance management framework	Equalities integrated into the Council	CEG / Performance Team / All Services	March 2008	Ongoing	Non-Statutory	Integrated into service planning guidance since 2007 & reinforced for 2009/10 Plans. Incorporated into new Corporate Plan 2008-11. Further training & development required.
21	Achieve Level 2 of ESLG	Exceed Commitment to equalities agenda by conducting impact assessments	All services	March 2008	March 2008	Non-statutory	BVPI 2a. Achieved following commencement of INAs

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
22	Achieve substantial compliance with Race Equality Duty	Raise awareness of Race Equality Duty	All services	March 2009	March 2008	Non-Statutory	BVPI 2b. Achieved one year earlier than scheduled following update of Race Equality Scheme. March 2008 outturn 78%, exceeding target of 61%. More work needed on delivery.
23	Improve performance on a number of other equalities associated BVPIs	Performance improvement in regard to employment	HR / CEG	March 2009		Non-Statutory	Achieved mixed performance on 2007/08 equalities BVPI's. BVPI's now abolished but use as local indicator targets. Will raise awareness with employees on local indicators

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
24	Build capacity	Greater expertise within the Council	Performance / HR / CEG	October 2006 & Ongoing	Ongoing	Non-Statutory	CEG, training sessions and undertaking INA's are raising knowledge/ awareness of equalities issues throughout the Council. Performance Team continue to build capacity through work with County Equalities Forum.
25	Monitor, review and update Equality and Diversity Action Plan as appropriate	Action Plan is kept up to date in line with new legislation and Council priorities	Performance & Audit Manager	October 2006 & Ongoing	Further review January 2009	Non-Statutory	Updated November 2007 – see 1-07 and 2-07 below Will be further updated in January 2009

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Additions to the Action Plan.

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
Page 30-1-07	Review recruitment & selection procedures to ensure equality – e.g. application form, large print, placing of adverts, monitoring of applicants, training for managers	Improved procedures and accessibility	HR	Summer 2008	October 2009	Statutory	In progress. Application form available in large print & on line. Whilst equalities data is currently recorded on applicants, capability to monitor and analyse is limited – will be addressed with implementation of HR system recruitment module in 2009. Manager training and formulation of recruitment/selection policy are next priority areas.

Key - ■ Completed ■ In Progress ■ Not Yet Started (schedule slipped)

Ref	Action	Outcome	Responsibility	Target Date	Revised Achieved/ Target Date	Statutory Requirement	Comments on Progress
2-07	Review equal opportunities policy to ensure compliance with legislation and best practice	People benefit from equality best practice in both employment and service delivery and current legislation complied with	HR	October 2008	Before December 2009	Statutory	Review of Disability Equality Scheme due in December 2009 likely to lead to new all-encompassing Single Equalities Scheme.

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Council Tax Base 2009/2010
Report of:	Financial Services Group Manager
Status:	Public

1. Purpose of Report

- 1.1 To set the Council Tax Base for the District of Blaby and the parishes therein.

2.	<u>Recommendations</u>
2.1	The report of the Financial Services Group Manager relating to the calculation of the Council's Tax Base for 2009/2010 be approved.
2.2	That, in accordance with the Local Authorities (Calculation of Tax Base) Regulations 1992, as amended, the amount calculated by Blaby District Council as its Tax Base for the year 2009/2010 shall be 31,222.28
2.3	That, in accordance with the above regulations the amount calculated by Blaby District Council as the Council Tax Base for individual Parishes for the year 2009/2010 shall be as shown at Appendix C.
2.4	That any expenses incurred by the Council in performing in a part of its area a function performed elsewhere in its area by a Parish or Community Council or the Chairman of a Parish Meeting shall not be treated as special expenses for the purposes of Section 35 of the Local Government Finance Act, 1992.
3.	<u>Reason for Decisions Recommended</u>
3.1	The Council is statutorily required to set its tax base each year by not later than 31 st January preceding the subject year. The tax base must reflect special expenses unless the Council formally resolves to disregard such items.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 05/08(820).

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 Introduction

It is a statutory requirement for each authority with responsibility for the collection of Council Tax to determine the Tax Base for its administrative area, including where required, a Tax Base for each parish within its area. At its meeting on 10th December, 2003 the Council resolved to delegate power to set the Council Tax Base to the Cabinet Executive. The Tax Base has to be approved between the 1st of December 2008 and 31st of January 2009 and the Cabinet Executive therefore requested to approve its adoption.

In addition to the Tax Base, Cabinet Executive is also requested to approve an appropriate resolution concerning “special items of expenditure” under Section 34 and 35 of the Local Government Finance Act 1992. Information relating to these two issues is set out further below.

6.2 The Council Tax Base

The calculation for determining the Council Tax in respect of the services provided by Blaby District Council is set out below in narrative form.

$$\frac{\text{District Council Net General Fund Expenditure}}{\text{Council Tax Base}} \text{ equals } \text{Revenue Support Grant and Redistribution of Business Rates}$$

A key element of the above calculation is the Council Tax Base itself. This represents the number of Band D equivalent dwellings adjusted for the following items:

- Exemptions;
- Discounts;
- New properties;
- The Collection Rate percentage.

The Council Tax Base (T) calculation is defined by the following formula:-

$$T = A \times B$$

The constituent elements of A and B are set out in Appendix A.

6.3 Calculation

The Schedule at Appendix B sets out by way of a matrix this authority's estimates in relation to the above formula. Each line of calculation is preceded by a letter which can be cross referenced to the formula at Appendix A. The Tax Base has been calculated at **31,222.28** and represents

a **0.19%** decrease over the **2008/2009** figure of **31,281.01**.

This decrease is primarily the result of an increase in empty dwellings. (54% increase). It has also been influenced by the lack of new build in the area.

A summary of the individual Parish Tax Bases is attached at Appendix C.

Under the provisions of the Regulations I am required to advise the County Council, Police and Fire authorities, and the individual Parish Councils of their Council Tax Base prior to the 31st of January 2009.

6.4 Section 34 and 35 – Local Government Finance Act 1992

Section 34 of the above Act details the formula to be used in the calculation of Council Tax for different parts of a billing authority's area i.e. Parishes. This enables the charge relating to individual Parish Precepts to be incorporated into the Council Tax bills relevant for that area.

For the purposes of the above Act, Parish Precepts are deemed to be "special items" of expenditure insofar as the billing authority is concerned, a special item being one which is taken into account by the billing authority which relates to only part of the billing authority's area.

However, under Section 35 of the same Act, unless an authority resolves otherwise, the authority is required to carry out a separate calculation for each Parish in respect of those functions carried out by the District Council in each Parish (i.e. special items) which is carried out by Parishes themselves elsewhere in its area. In order to avoid this additional complexity I have again included an appropriate recommendation for resolution by the Cabinet Executive.

7. Other Relevant Considerations

7.1 None relevant to this report.

8. Other Options Considered

8.1 None – the setting of the Council Tax Base is a statutory requirement.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 None in the context of this report.

11. Appendices to this report

11.1 Appendix A – Definition of 'A' and 'B' within Council Tax Base Calculation Formula

11.2 Appendix B – Council Tax Base Calculation 2009/2010.

11.3 Appendix C – Council Tax Base Summary 2009/2010.

12. List of Background Papers

12.1 File and calculations held by Revenues and Recovery Manager.

The following Officer(s)/Member(s) have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder (Cabinet Executive/Council reports only)

DEFINITION OF A

In broad terms A equals the aggregate of the Band D equivalent dwellings after taking into account certain adjustments.

The calculation of the Band D equivalent dwellings for each band is known as the ‘relevant amount’ and is determined in accordance with the following formula:-

$$\text{Relevant amount} = \frac{(H - (I \times E) + J) \times F}{G}$$

where:-

“H” is equal to:- the number of chargeable dwellings listed in each band on the 15th of September calculated as follows:-

- (i) the number of dwellings in the band listed in the valuation list on the 15th of September, less:-
- (ii) an estimate of the number of exempt dwellings on the 6th of October.

Taking into account alterations to the valuation list, advised by the Valuation Officer, but not shown on the valuation list, together with disabled reductions (i.e. movements to the next band down).

“I” is equal to:- The estimated number of discounts in respect of chargeable dwellings as at the 6th of October, expressed in terms of units of discount.

“E” is equal to:- The appropriate percentage of discount (e.g. 25%).

“J” is equal to:- The estimated amount of changes in the number of chargeable dwellings, shown either as an increase or a decrease, between the 6th of October, and the end of 2008/2009 expressed as full year equivalents, taking into account relevant discounts not included in “I” above.

“F” is equal to:- The multiplier for the valuation band being calculated.

“G” is equal to:- The multiplier for Band D.

The individual band amounts are then aggregated to give a total relevant amount for the District.

DEFINITION OF B

B is equal to the authority’s estimate of its collection rate for the year expressed as a percentage of the total Band D equivalent dwellings. The percentage has been set at 99%. Collection performance during the current financial year indicates that it is appropriate to set a rate of 99%, which will enable the Collection Fund to fully discharge its precepting requirements.

Council Tax Base Summary 2009/10

Parish	Parish Tax Base			
	This Year	Last Year	Movement	% Movement
Aston Flamville	71.79	71.61	0.18	0.25
Blaby	2,040.18	2,052.42	-12.24	-0.60
Braunstone Town	5,058.63	5,053.53	5.09	0.10
Cosby	1,157.42	1,158.90	-1.48	-0.13
Countesthorpe	2,195.29	2,206.35	-11.06	-0.50
Croft	565.30	572.65	-7.35	-1.28
Elmesthorpe	213.00	212.49	0.51	0.24
Enderby	1,907.86	1,922.56	-14.70	-0.76
Glenfield	3,562.48	3,560.75	1.73	0.05
Glen Parva	1,864.49	1,875.21	-10.72	-0.57
Huncote	533.91	533.13	0.78	0.15
Kilby	116.62	116.46	0.16	0.14
Kirby Muxloe	1,950.53	1,983.47	-32.94	-1.66
Leicester Forest East	2,172.13	2,126.54	45.59	2.14
Leicester Forest West	18.00	16.38	1.62	9.89
Lubbesthorpe	28.46	27.78	0.68	2.45
Narborough	2,896.90	2,896.35	0.55	0.02
Potters Marston	10.35	9.76	0.59	6.05
Sapcote	860.36	859.19	1.17	0.14
Sharnford	383.94	383.71	0.23	0.06
Stoney Stanton	1,250.11	1,259.42	-9.31	-0.74
Thurlaston	297.15	300.29	-3.14	-1.05
Whetstone	2,050.22	2,065.61	-15.39	-0.75
Wigston Parva	17.16	16.45	0.71	4.32
Total	31,222.28	31,281.01	-58.73	-0.19

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Corporate Charging Policy
Report of:	Financial Services Group Manager
Status:	Public

1. Purpose of Report

- 1.1 This report sets out a proposed Charging Policy in respect of those fees and charges levied by the Council for consideration by Cabinet Executive. The policy is attached at Appendix A.

2.	<u>Recommendation</u>
2.1	The Cabinet Executive is asked to approve the Charging Policy at Appendix A.
3.	<u>Reason for Decision Recommended</u>
3.1	The Local Government Act 2003 gives powers for authorities to charge for discretionary services.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 10/08(056).

5. Key Decision

- 5.1 Yes.

6. Matters for Consideration

- 6.1 Cabinet Executive is asked to consider the attached Charging Policy which sets out a framework for determining fees and charges for the provision of services by the Council. The policy is attached at Appendix A.

7. Other Relevant Considerations

7.1 Equalities

The Equalities Group are currently carrying out a Needs Impact Assessment on this policy.

8. Other Options Considered

8.1 None.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 None

11. Appendix to this report

11.1 Appendix A – Corporate Charging Policy

12. List of Background Papers

12.1 None.

The following Officers/Members have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder (Cabinet Executive/Council reports only)



Blaby District Council

Charging Policy

November 2008

		Page
1.	Introduction	1
2.	Statutory Background	2
3.	General Principles:	3
4.	Key Principles: Which services should the Council charge for?	4
5.	How should the amount levied be determined?	5
6.	Which service users should receive a subsidy?	6
7.	How will any surplus income be used?	7
8.	A summary of the Council's Charging Policy	8
9.	How this policy will be implemented	10

1. INTRODUCTION

- 1.1 This paper sets out the Council's proposals for developing a charging policy. The policy has three fundamental principles:
- Services should raise income wherever there is a power or duty to do so.
 - The income raised should cover the full costs of providing the service including all overheads
 - Any departures from this policy must be justified in a transparent manner with reference to the Council's priorities and policies.
- 1.2 In recent years there has continued to be increasing pressures on local authorities to make best use of the positive potential of charges and to recognise the importance of recovering costs by charging for services.
- 1.3 The decision on whether to make a charge (and its level) is not always within the control of the Council. But where it is, it is important that the implications of the charging decisions being taken are fully understood and that the officers to whom charge setting powers have been delegated have the appropriate information they need to make informed choices.
- 1.4 The purpose of this Policy is not to be over-prescriptive, but rather to provide a framework for how Blaby District Council approaches the question of charging for its services. The application of this policy should bring greater clarity to the process of setting charges and will therefore assist the Council to achieve its corporate objectives. It is also intended to help guide the process of reviewing charges for existing services and setting charges for any new services that may be introduced in the future.
- 1.5 There are situations when the Council may decide not to raise income when it is empowered to or not to recover the full cost of a service. Members must be supplied with information to allow them to make these decisions in a structured and explicit manner. A decision to forego income or to subsidise a service is a policy decision about resources as significant as any decision made in the budget setting process.

2. STATUTORY BACKGROUND

- 2.1 The Local Government Act 2000 gave local authorities a wide power to act for the economic, social and environmental well-being of their areas. The general power to charge for discretionary services was included in the Local Government Act 2003. Key features are summarised below.
- 2.2 Authorities are under a duty to ensure that, taking one year with another, the income from charges does not exceed the cost of provision.
- 2.3 Authorities must already have the power to provide the service and the recipient of the discretionary service must have agreed to its provision and to pay for it. Conversely, the Act does not override any provisions which either expressly prohibit the charging for the service or confer a power to charge.
- 2.4 Charges may be set differentially, so that different people are charged different amounts. Authorities are not required to charge for discretionary services and may provide them free if they so decide.

3. GENERAL PRINCIPLES

- 3.1 An Audit Commission report in 1999 (The Price is Right) highlighted a 'chaotic' variety of different powers and restrictions on a local authority's ability to charge. At one extreme lies mandatory free provision of service and at the other substantial local discretion to set an appropriate fee scale. It is also the case that in some instances the Government prescribe the fee which a Council may charge for a given service.
- 3.2 This has now changed as described in Section 2, with the introduction of a general power to charge for discretionary services.
- 3.3 Since then a further Audit Commission report into this subject, "Positively Charged – Maximising the benefits of local public service charges" (January 2008), has been published. This emphasised the need for Councils to have an agreed policy on charging for discretionary services.
- 3.4 In general terms, it is the Council's policy that unless there is good reason why an exception should be made, a charge should be levied for all discretionary services in accordance with this Charging Policy.
- 3.5 With regard to statutory services, where the Council has control over whether a charge should be levied, and there are no good reasons why an exception should be made, it is recommended that the Council's policy that a charge should be made.
- 3.6 All charges within the Council's control should be reviewed at least annually. Where only one review is undertaken this should be timed to fit in with the annual Budget Setting process and the principles of any changes should be available for discussion at the budget meetings.

4. KEY PRINCIPLES – WHICH SERVICES SHOULD THE COUNCIL CHARGE FOR

4.1 As referred to in Section 3.4, charges should be made for all discretionary services. Additionally, services should be reviewed to establish whether charges could be introduced where these are not already implemented.

4.2 However, it is recognised that there will be important exceptions that will make charging inappropriate in a number of cases. These include:

- circumstances where the service in question is delivered to all residents or householders equally and which could therefore be considered to be funded from Council Tax.
- circumstances where the administrative costs associated with making a charge would outweigh any potential income
- circumstances where making a charge would be directly contrary to achieving one of the Council's corporate objectives as expressed in previously agreed strategies or statutory requirements.
- circumstances where charging would be counterproductive (i.e. it may result in a substantial reduction in usage of the service).
- circumstances where the Council incurs extra charges to enable people to have fair access to services

4.3 It is therefore the Council's policy that, in general, service users should make a direct contribution to the cost of providing services at their point of use. When charges for services are reviewed it will be against this background and it will be necessary to consider in each case if exceptions such as those outlined above make charging inappropriate.

5. KEY PRINCIPLES – HOW SHOULD THE AMOUNT LEVIED BE DETERMINED?

5.1 Where the Council controls the level of charge to be made for a given service, it is the Council's policy that the charge should, in general, be such that it covers the actual cost of providing the service (including support services).

5.2 It is however recognised that this will not be appropriate in all circumstances and the actual amount of charge proposed will need to be a reflection of:

- any relevant Council strategies or policies and any subsidy or concessions given (*note: the question of appropriate concessionary groups and the level of concession is dealt with in detail in section 6*)
- market conditions and prices charged by competitors and/or other local authorities
- the need to avoid any potential distortion of the market which might otherwise occur from pricing services below the levels charged by private sector concerns for similar services
- the need for all charges imposed by the Council to be reasonable (whilst retaining the flexibility to charge commercial organisations a fair price)
- the need to avoid any exploitation of customers who have no option but to use the Council's services
- the desirability of increasing usage of a given service
- the possibility of increasing income to the Council

5.3 One of the aims of this policy is to ensure that establishing the 'right' price for a service should not be simply a case of adding an inflationary increase to last year's charge. When charges are reviewed all the factors set out above should be taken into account in order that officers may make informed choices on the level of charge to be set.

5.4 Charges should be set at levels that, as far as possible, do not preclude members of the public from using or benefiting from a service. Consideration should be given to the ability of individuals, including those of limited means, to meet the charges and benefit from the service available and consistently reflected in agreed charges.

6. KEY PRINCIPLES – WHICH SERVICE USERS SHOULD RECEIVE A SUBSIDY?

- 6.1 In some circumstances it may be appropriate to consider offering an ‘across the board’ subsidy to all users of a particular service where this is consistent with achieving the Council’s objectives. It is also recognised that offering concessions for certain key user groups is consistent with achieving the Council’s high level objectives as set out in a range of existing strategies.
- 6.2 For example, the Council’s equal opportunities policy commits the Council to “providing access to services and facilities to all”. Concessions are clearly one of the ways in which the Council can fulfil this commitment.
- 6.3 Recognising this broader agenda, it is the policy of the Council that when charges are reviewed concessions should be considered for the following groups:
- young people under 16 years of age
 - full time students
 - people with a disability and their carers
 - senior citizens over state pensionable age
 - any category of persons in receipt of means tested benefit
- 6.4 It is not appropriate to fix a level of concession in this policy as this removes all discretion. However a concession of up to 100% of the full charge may be appropriate in some cases.
- 6.5 It is recognised that in some circumstances concessions may not be appropriate and that it will be necessary to consider carefully the impact on income before introducing concessions to service areas that do not currently offer them. However, an assessment of the desirability of offering concessions (and the financial implications) needs to form part of the evaluation of an appropriate charge for any given service.

7. KEY PRINCIPLES – HOW WILL ANY SURPLUS INCOME BE USED?

- 7.1 At present the way in which the Council prepares its budgets is such that income derived from charging for services is used to offset the cost of providing the service in question. This is consistent with the current statutory situation. Any modest surplus is then returned to the Council's General Fund.
- 7.2 The advantage of such an approach at a high level is that it enables resources generated through charging to be used wherever the highest priority exists – i.e. for a corporate view to be taken regarding the use of the available resources.
- 7.3 It is therefore the Council's policy that any surplus generated from charging shall be seen as a corporate resource to be used where need is greatest, provided this is not prohibited by other statutory requirements or government guidance.
- 7.4 However, it is acknowledged that the ability to use charges to deliver the targets set by Members requires a degree of freedom to experiment and corporate controls (as expressed through this policy) need to avoid imposing unnecessary restrictions. Therefore, proposals for 'reinvesting' any additional income raised from charging in the expansion and development of a particular service will need to be considered as part of the annual review of charges. Each proposal will therefore be considered on its own merits at that time.
- 7.5 It is also recognised that in some special circumstances (such as Building Control) the approach to the use of surplus may be influenced by central government guidance.
- 7.6 It is also the Council's policy that, subject to any requirements imposed by the Council's Constitution, charges for individual services may be varied "in year" at the discretion of the responsible Director following discussion with the Section 151 Officer and appropriate Portfolio Holder.

8. A SUMMARY OF THE COUNCIL'S CHARGING POLICY

8.1 It is the Council's policy that service users should make a direct contribution to the cost of providing services (both discretionary and statutory) at their point of use unless there are:

- Circumstances where the service in question is delivered to all residents or householders equally and which could therefore be considered to be funded from Council Tax
- Circumstances where the administrative costs associated with making a charge would outweigh any potential income
- Circumstances where making a charge would be directly contrary to achieving the Council's corporate objectives as expressed in previously agreed strategies
- Circumstances where charging would be counterproductive (i.e. it may result in a substantial reduction in usage of the service).

8.2 The charge levied should, in general, be such that it covers the actual cost of providing the service (including support services). The level of charge will however be made having regard to:

- any relevant Council strategies or policies (e.g. Equal Opportunities policy, Leisure Strategy etc) and any subsidy or concessions which may be appropriate
- market conditions and prices charged by competitors and/or other local authorities.
- the need to avoid any potential distortion of the market which might otherwise occur from pricing services below the levels charged by private sector concerns for similar services.
- the need for all charges imposed by the Council to be reasonable (whilst retaining the flexibility to charge commercial organisations a fair price).
- the need to avoid any exploitation of customers who have no option but to use the Council's services.
- the desirability of increasing usage of a given service.
- the possibility of increasing income to the Council.

- 8.3 It is the policy of the Council that when charges are reviewed concessions should be considered for the following groups:
- young people under 16 years of age
 - full time students
 - people with a disability and their carers
 - senior citizens over state pensionable age
 - any category of persons in receipt of means tested benefit
- 8.4 It is not appropriate to fix a level of concession in this policy as this removes all discretion.
- 8.5 Any surplus generated from charging shall be seen as a corporate resource to be used where need is greatest.
- 8.6 Proposals for 'reinvesting' any additional income raised from charging in the expansion and development of a particular service will need to be considered as part of the annual review of charges. Each proposal will therefore be considered on its own merits at that time.
- 8.7 All charges within the Council's control should be reviewed at least annually. Where only one review is undertaken this should be timed to fit in with the annual Budget Setting process and the principles of any changes should be available for discussion at the budget meetings.
- 8.8 Subject to any requirements imposed by the Council's standing orders, charged for individual services that fall within the Council's portfolio structure may be varied 'in year' at the discretion of the responsible Director in consultation with the Section 151 Officer and the appropriate Portfolio Holder. Charges for individual services managed by the Service Managers may be varied 'in year' at the discretion of the responsible Service Manager in consultation with the Chief Executive, Section 151 Officer and the appropriate Portfolio Holder.
- 8.9 When charges are reviewed it will be necessary to undertake an analysis which includes an examination of all the factors set out above in order that officers may make informed choices on the level of charge to be set.
- 8.10 A criteria list will be devised to assist officers in implementing fees and charge in their respective service areas.

9. HOW WILL THIS POLICY BE IMPLEMENTED?

- 9.1 Charges are subject to annual review as part of the Council's budget setting process. In future, the review of existing charges will be undertaken having regard to the guidelines set out within this policy.
- 9.2 It will also be necessary for each service manager, as part of the preparation of annual service plans, to consider if services currently provided free should be subject to a charge or if good reason exist for maintaining a free service.
- 9.3 In circumstances where a charge is being introduced for the first time (or being substantially increased) it will be necessary to undertake a consultation exercise and for the public to be informed of the reasons for the Council's decision.

BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Charging for Planning Advice
Report of:	Development & Conservation Manager
Status:	Public

1. Purpose of Report

- 1.1 The purpose of this report is to advise Members of the option to charge for planning advice currently provided free. It sets out alternative charging regimes and seeks approval to charge for the provision of planning advice.

2.	<u>Recommendations</u>
2.1	That charges be introduced for the provision of planning advice.
2.2	That fees be charged for pre-application meetings and correspondence in accordance with the schedule attached at Appendix 1 to this report.
2.3	That the timetable for the provision of advice (attached to this report at Appendix 1) also be accepted.
2.4	That inquiries about permitted development be dealt with through applications for certificates of proposed lawful development and charged at the national fee.
2.5	That the charges be reviewed after 6 months and annually thereafter.
3.	<u>Reason for Decisions Recommended</u>
3.1	To enable the District Council to recover its costs in providing planning advice.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 10/08(050).

5. Key Decision

- 5.1 Yes.

6. **Matters for Consideration**

6.1 This report deals with charging for pre-application advice and dealing with requests about whether planning permission is needed.

6.2 It is not proposed to make charges for pre-application advice to small businesses, local community organisations, Parish, District and County Councils.

6.3 Informal verbal advice will remain freely available to householders and to assist with this, the availability of officers has recently been improved.

6.4 **Background**

Section 93 of the Local Government Act 2003 permits local authorities to charge for discretionary services. These are services which local authorities provide but for which there is no statutory requirement. When charging for services, the authority is allowed to cover its costs for providing the services. Year on year, the service should not make a profit. Local Council's, including this one, have traditionally provided free of charge advice to developers wishing to submit planning applications.

6.5 When offering a free service, there are a number of drawbacks. Preparation for meetings can be time consuming, especially in terms of officer time. Officer time is diverted from dealing with planning applications. Many proposals are speculative and do not result in the submission of a planning application. Time spent on giving a free pre-application advice service diverts staff resources, including other duties such as dealing with planning applications for which fees have been paid.

6.6 The provision of a free service does encourage potential applicants to discuss their proposals and hopefully result in the submission of a better quality planning application. A developer may benefit by not carrying out abortive work on a scheme which is unlikely to be approved.

6.7 Research carried out by the Audit Commission and the Planning Advisory Services indicate that the charging of fees for pre-application meetings does bring a number of advantages:

Frivolous meetings are deterred;
Developers know the level of service they are going to receive;
The advice given is regarded as being more valuable; and
In terms of cost of development, the charges for advice are marginal.

6.8 At present, none of the Leicestershire Authorities charge for pre-application advice. The practice of charging for pre-application advice and meetings started with authorities in London and the surrounding parts of the south-east of England. Over time the practice has become more common and spread to authorities throughout the country.

6.9 **Options for Charging**

Generally 3 types of charging structure have been identified. These are:

1. Fees set according to the scale of the proposal, as categorised in

performance indicators (majors/minors/householders);

2. Fees set as a percentage of the equivalent application fee; and
3. Fees set according to a rate for staff time.

The first two options have the advantage of simplicity and predictability and allow the requisite monies to be collected before the meeting and remove the officer from the need to time the meeting or ask for the required fee following the meeting.

- 6.10 Authorities who make charges have banded the costs according to the scale of the development proposed and the complexity of the advice offered. In the first instance, it is proposed to operate a similar scheme but to keep the charging regime simple. It is also proposed that the charges are made for each meeting. The proposed scale of charges is set out in Appendix A.

6.11 **“Permitted Development” Enquiries**

Another free service currently offered is advising on whether proposals (or in some cases completed developments) are “permitted developments”. The main user of this service is householders considering extensions/ alterations to their property. Some authorities do not offer this service, including at least one in Leicestershire. Instead, the developer/owner is directed to make an application for a certificate of proposed lawful use or, if appropriate, a certificate of lawful development. Such applications require the payment of a fee. The fee is the same as the equivalent planning application fee for an existing development and for a proposed development, half the fee. Given that the recent changes to the General (Permitted Development) Order have made, the assessment of the need for planning permission for householder developments more time consuming. It is recommended that the Council adopts this approach.

- 6.12 Householders will not be discouraged from seeking our advice which will remain freely available on an informal basis and assist with receiving better quality planning applications.
- 6.13 Because this is a new approach, it is recommended that the scope and scale of charges be initially reviewed after 6 months and a further 6 months after this. This is to enable any changes required to make the system clearer, fairer and more efficient to be implemented.
- 6.14 When requests for meetings are made guidance will be given as to the type and scope of information the applicant should provide and that this information should be provided in advance of the meeting. This will allow the best use to be made of the meeting time.
- 6.15 The Council’s draft charging policy appears earlier on this agenda. The recommendations contained within this proposal are in accordance with the principles set out within the proposed charging policy.

7. **Other Relevant Considerations**

- 7.1 None relevant to this report.

8. Other Options Considered

8.1 Continuing to provide the service for free. This is not considered to be appropriate for the reasons set out in the report.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 The proposal can be implemented within existing resources.

The estimated income from charging is set out below:

	Current year	2009/10	2010/11
Revenue	£500	£1500	£1500
Capital	0	0	0

Efficiency	Estimated Cashable Savings	Estimated Non-Cashable Savings	How measured
Effective use of officer time	0	£2000	Estimate of time used to provide service for free

11. Appendix to this report

11.1 Appendix 1 – Charging Schedule/Service Provision.

12. List of Background Papers

12.1 A Material World – Planning Advisory Service.

12.2 Positively Charged – Audit Commission.

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- ✓ **Monitoring Officer** (Legal Services Manager)
- ✓ **Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

Scale of Fees:

- £500 for developments above 50 dwellings or 1000 sq.m;
- £300 for strategic major applications over 50 dwellings or 1000 sq.m commercial;
- £250 for major proposals (between 10 and 50 dwellings or 1000 – 10,000 sq. m commercial);
- £100 for minor proposals (between 1 and 9 dwellings or under 1000 sq. m commercial).

Flat Rate Fee for the Provision of Written Advice:

- £200 for strategic major proposals;
- £150 for major proposals;
- £100 for minor proposals.

Within 10 working days of the receipt of a request for a meeting a date will be fixed.

Within 10 working days of the meeting, or as otherwise may be agreed, written confirmation of the advice to be provided.

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Blaby Town Centre Masterplan
Report of:	Corporate Head of Policy & Partnerships
Status:	Public

1. Purpose of Report

- 1.1 To update Cabinet Executive on the preparation of the Blaby Town Centre Masterplan and to agree how to progress the Priority Projects proposed therein to implementation and delivery, enabling the Masterplan Vision to be realised.

2.	<u>Recommendations</u>
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2.1	That Cabinet Executive agrees the following:
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|--|---|
| | <ul style="list-style-type: none"> (i) support, in principle, for the Blaby Town Centre Masterplan Report (October 2008) in particular for the four transformational projects recommended within; (ii) a new post of Part-Time Town Centre Manager for Blaby (18.5 hours a week), at S.P. 29 for a fixed term period of 2 years, for which funding has been provided as part of the 2008/2009 budget process; (iii) the establishment of a Town Centre Implementation Group as a Partnership body with terms of reference to advise on, and deliver, the Masterplan projects; (iv) that priority should be given to improvements to the public realm, as outlined in Options 1 and 2 within this report; (v) the preparation of a Blaby Town Centre Supplementary Planning Document based on the Masterplan. |
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3.	<u>Reason for Decision Recommended</u>
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|-----|--|
| 3.1 | <ul style="list-style-type: none"> (i) A statement of support for the principles and proposals of the Masterplan will make it clear to the public, businesses, developers and other parties that the Council is committed to the regeneration of Blaby Town Centre. The projects recommended in the Masterplan would make a significant impact on the Town Centre and enable the Vision to be realised. |
|-----|--|

(ii)	A Town Centre Manager would be a valuable resource to co-ordinate the work of the many individuals, businesses and other bodies which have an interest in the Town Centre.
(iii)	An Implementation Group would seek to co-ordinate the work of the various parties involved by means of an Implementation Plan.
(iv)	Improvements to the public realm could be undertaken in the short-term and may act as a stimulus to private sector investment. The options shown indicate the level of funding which may be required from this Council to deliver the recommendations.
(v)	Supplementary Planning Document status will place the Council in a stronger position when seeking to negotiate contributions for Town Centre Improvements from developers.

4. Forward Plan

4.1 Forward Plan Reference Number: 03/08 (805).

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 Background

6.1.1 Blaby Town Centre Masterplan is a Regeneration Project that aims to improve and enhance the Town Centre, making it more attractive and appealing as a shopping and leisure venue. The Masterplan Study is a document that guides transformational change and future development in the Town Centre over the next fifteen years through a number of Site Intervention, Transport, Environmental Improvement and Non-Physical Projects.

6.1.2 The project was initiated in November 2006 as part of the Leicestershire County Council (LCC) Market Towns Programme. Leicester Shire Economic Partnership (LSEP) offered a grant of up to £25,000, Blaby District Council contributed £10,000 and a further £5,000 came from Leicestershire County Council's Regeneration Fund.

6.1.3 **Steering Group** – A Steering Group was set up in January 2007 to agree the content of the Masterplan Brief, interview, select and appoint consultants and agree the content of the Final Report. Membership of the Steering Group comprised:

Blaby District Council	1 Member (Cabinet Portfolio for the Natural and Built Environment) and 1 Officer.
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Leicestershire County Council	1 Member (LCC Ward Member for Blaby & Glen Parva) and the Team Leader of Regeneration.
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Leicester Shire Economic Partnership	1 Officer (Economic Programme Manager, Sustainable Communities)
Blaby Parish Council	1 Member and 1 Officer.
Town Centre Businesses	1 Representative.

6.1.4 Steering Group meetings were held approximately every month to track progress and were chaired by the Cabinet Portfolio Holder for the Natural and Built Environment.

6.1.5 **Key Stages and Consultation Process** – The process of developing a Masterplan has been through consultation and engagement with key stakeholders playing a vital and integrated role throughout the process.

6.1.6 **Commissioning** – Specialist consultants Taylor Young were commissioned in February 2007 to carry out the Masterplan Study.

6.1.7 **Baseline Stage: March – June 2007** – Information gathering, research, site visits and meetings including a Town Centre Forum workshop on 22 March 2007 and a Town Centre Business Survey in May-June 2007. A Baseline Report was produced in August 2007.

6.1.8 **Options, Generation and Evaluation: June – August 2007** – Identification of sites, options and projects, and an evaluation of these with partners, stakeholders and the public, including a Stakeholder Workshop on 11 July 2007 for Blaby Businesses. An Options Stage Public Drop In Day on 18 August 2007 was attended by approximately 300 people with 75% of respondents in favour of proposals presented which included the 4 priority demonstrator projects described below:

- **John’s Court**

Proposed redevelopment to create a larger public square with the development of community facilities and a public library at first floor level and the addition of tiered car parking. This is a challenging long term transformational project that has the prospect to deliver significant physical change and reinforce the Town Centre’s retail offer. 1825 sq metres of extra retail floorspace is proposed with the retail mix changing to comprise larger floorplates together with kiosk type units.

This Council would play an influencing role with Officer time needed to progress this project, promoting and encouraging interest and investment from private sector developers. It is envisaged that the private sector developer would contribute to the cost of the public realm proposed in the new public square.

- **British Legion Site**

A proposed development scheme to create a new mixed-use site in the centre of Blaby that could accommodate 2200 sq metres of retail units and A3 use at ground floor and 1000 sq metres of commercial office space at first floor, with basement car parking provision. A new public square is also proposed with a pedestrian walkway linking Sycamore Street and Lutterworth Road. This

project offers opportunities for the evening economy to be improved near to one of the perceived “centres” of Blaby, Forge Corner.

This Council would play the role as described for John’s Court (above). It is envisaged that the private sector developer would contribute to the cost of the public realm proposed in the new public square and walkway.

- **Bouskell Park**

Proposed development of a new visitor centre with community/ exhibition space and café to enhance the park as a visitor attraction and encourage more visitors into Blaby Town Centre. This is a sensitive proposal as it would involve a reduction in public open space. Funding opportunities may include the Lottery and other public sector finance contributed from Leicestershire County Council Museums and the Leicester and Leicestershire Economic Development Company (LLEDC).

This Council’s role would be to influence and co-ordinate design, assimilate and contribute to funding streams and to operate and manage the centre in partnership with local groups, e.g. Blaby Heritage Museum. Officer time and a contribution from this Council and funding partners would be needed to begin the implementation of this project by commissioning consultants to develop the design brief. A broad estimate of costs is shown later in this report.

- **Town Centre Core Environmental Enhancements**

This project focuses on enhancing the physical environment within the Town Centre with a host of improvement measures recommended, such as upgrades to pedestrian footways, changes to the road surface with the proposed installation of a stretch of raised table to create greater priority for pedestrians and a sense of “shared space”, public art installations to create gateway features at key entry points, planting of trees, reviewing and improving signage and street furniture. This project will be driven by the public sector with co-ordination from this Council and design input from the Highway Authority, Leicestershire County Council.

6.1.9 Masterplan Development: September – November 2007

This involved refining options and the development of key “demonstrator projects” with a second Public Exhibition on 17 November 2007. This event was well attended. Greater detail on proposals was shared and views expressed by the public were generally supportive.

6.1.10 The Final Masterplan Report

The Final Masterplan Report was received in October 2008. It is a comprehensive and detailed document comprising over 80 pages so it is not deemed appropriate to append the complete report. A copy is available in the Policy and Partnerships Division and will be available shortly on the Council’s website. The document is organised into the following sections:

1. Introduction;
2. Challenges and Opportunities;

3. Consultation and Engagement;
4. Vision and Objectives;
5. Projects and Masterplan;
6. A Transport Strategy;
7. Transformational Projects;
8. Priority Projects;
9. Making It Happen;
10. Next Steps.

6.1.11 The Transport Strategy includes reference to the need for a car parking strategy. Any work on such a strategy would need to complement the work currently being undertaken on implementing this Council's Car Parking Strategy (2005) as it applies to the Town Centre.

6.1.12 The most significant sections concerning implementation (Sections 8, 9 and 10) are appended to this report. 12 Priority Projects are described in detail, together with actions recommended for delivery with associated risks, to enable the Vision of the Masterplan to be realised.

Issues Requiring Consideration

Resources / Funding

6.1.13 Staffing

This Council's resources dedicated to Economic Development activities are currently limited to one part time officer (16 hours per week). No constituted partnership delivery body currently exists. It is infeasible for the Masterplan Vision to be implemented from existing resource levels. It is anticipated that additional resources will be required to effectively prepare and manage the public sector partners, key landowners and key stakeholders. This could involve the transformation of the Masterplan Steering Group into an Implementation Group or a new body specifically constituted to drive the improvement and delivery strategy for Blaby Town Centre, e.g. "Blaby Town Centre Improvement Partnership". This would necessitate the creation of a new post of guide the implementation process. Given the size and character of the centre, it is considered that a part time post, initially on a fixed term contract, may be appropriate.

6.1.14 Blaby Town Centre is one of few towns across Leicestershire that is currently without a Town Centre Manager, appointed by the Local Authority. Greater emphasis will be placed on Blaby as a priority centre as it is regenerated, increasing the need for the Town Centre Manager position. This role would encompass day to day operation of the centre, management of town centre initiatives and events, marketing the centre as a shopping destination as well as overseeing the Improvement Partnership and seeking funds to realise the Masterplan Implementation Plan.

Project Implementation Costs

6.1.15 At present £50,000 is available in the capital budget for implementing the Masterplan proposals in 2008/2009. However, this is currently unspent due to delays in the programme.

6.1.16 Public sector funding is required to implement the proposals for the Bouskell Park Project (which could be subject to a Lottery Bid) and the Town Centre Core Public Realm Improvement Scheme. Whilst the actual costs of implementing environmental, public realm and streetscape improvements are not yet identified, estimates of the funding levels required are shown in this report for Members' information.

6.1.17 External funding for priority projects will also need to be sought from appropriate partners (Leicestershire County Council and the Leicester and Leicestershire Economic Development Company). There is at present uncertainty concerning the level of funding that may be attracted from other partners to deliver the public realm element of the Masterplan. Funding is likely to be required from this Council.

6.1.18 Guidance from the Highway Authority on the Masterplan proposals has been sought to estimate the costs of implementing a 'minimum level of intervention public realm scheme' that is realistically deliverable within the next 2 years as a "quick win" project. This action would not be affected by the proposed retail developments that are likely to take longer to realise. Some concern has been expressed by the Highway Authority regarding the deliverability of some of the proposals e.g. the level of tree planting is not achievable as it is too dense and is prevented by service fixtures; installing a raised table throughout the heart of the Town Centre will be expensive and its viability needs to be tested. Broad estimates for two Options are shown below;

- **Option 1**

- upgrades to paving along the eastern side of Leicester Road from crossroads to Blaby Art & Print;
- work to entrance of Enderby Road car park including upgrading paving, rebuilding wall, planting, screening, artwork and pedestrian access;
- planters on Forge Corner;
- planters on southern end of Lutterworth Road;
- artwork and planters to create feature on western side of John's Court adjacent to car park entrance;
- artwork on the frontage of Aldi; and
- signage and street furniture review (not including upgrades identified).

This modest level of improvement is estimated to cost around **£120,000**.

- **Option 2**

The Masterplan notes that the raised table scheme would require considerably further work to investigate highway impacts and would require a significant reduction in traffic flow through the Town Centre. A Transport Study would be required to test the feasibility of this scheme (estimated at £40,000). This sum is not included in the costs below, which is merely an estimate of the construction costs to raise the road. It does not include any other work that would be required to remove traffic from the Town Centre, if indeed this was deemed to be a favourable option to pursue through further investigation. Due to

costs involved, this element is likely to be dependent on the proposed new retail redevelopments being realised (i.e. John's Court and British Legion). Costs for the removal or changes to services and utilities are not included in the costing and therefore would be additional, and probably quite significant, sum. This higher level improvement proposal for public realm improvement is estimated to be in the region of **£800,000**.

6.1.19 As stated earlier in this report there is uncertainty concerning the level of funding that may be attracted from other partners to deliver the public realm element of the Masterplan.

Status of the Masterplan

6.1.20 The Masterplan will form a 'material consideration' in the determination of planning applications within and around the Town Centre, as well as guide investment in the ensuing fifteen years. It should be used as a framework and guide to local residents, businesses and developers to deliver regeneration within the Town Centre.

6.1.21 The Masterplan is not included in this Council's Local Development Scheme (2007) as a Supplementary Planning Document, although it could be incorporated when the LDS is next revised. In the interim it could be shown in the 'informal timetable' for the preparation of Documents.

What would it mean if the Masterplan became a Supplementary Planning Document?	
Advantages	Disadvantages
Greater weight would be given to the Masterplan in determining planning applications.	The Local Development Scheme would need to be revised.
It would provide a firmer basis to negotiate financial contributions from developers, via S106 Agreements, for town centre improvements.	A further stage of public consultation would be required.
	A Sustainability Appraisal would be necessary. A delay in implementation and delivery of Priority Projects may result.

6.1.22 On balance it is considered that the benefits of SPD status outweigh the disbenefits.

Relevant Policies and Plans

6.1.23 Blaby District Local Plan (BDLP)

The BDLP contains policies to sustain and enhance the vitality and viability of the Town centre.

6.1.24 Local Transport Plan (LTP)

Transport policy for the area is primarily established through the Leicestershire Local Transport Plan. The priorities outlined in the LTP 2006-2011 have been taken into consideration in formulating the Masterplan in order to adhere to its general requirements and principles. The key priorities can be summarised as:

- Tackling congestion
- Access to facilities
- Reducing road casualties
- Improving air quality
- Reducing the impact of traffic
- Whole-life maintenance of transport assets

6.1.25 Reference has also been made to Parts 1 and 2 of Leicestershire County Council's approved web document "Highways, Transportation and Development" at www.leics.gov.uk/htd .

6.1.26 Regional Spatial Strategy for the East Midlands (RSS8)

Policies 21 and 23 of RSS8 (2005) and policy 22 of the Proposed Changes to the East Midlands Regional Plan (July 2008) encourage plans and proposals that assist regeneration and proposals that enhance the vitality and viability of existing town centres.

6.2.27 Planning Policy Statement 6 (PPS6)

PPS6 sets out Government policy in relation to planning for Town Centres. Amongst other things, PPS6 encourages a 'pro-active, plan led approach to planning for town centres'.....and that Local Planning Authorities (LPAs) should use tools such as....town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres'.

Leicestershire's Second Local Area Agreement 2008 - 2011

6.1.28 The Leicestershire Local Area Agreement has been developed with commitment from Leicestershire Together (which includes membership from Local District Strategic Partnerships plus a wide range of other partners) and Leicestershire County Council as a strategic plan to deliver key priorities to bring benefits and improvements for Leicestershire communities. Leicestershire's Second LAA was signed in June 2008 to cover the period 2008 – 2011 and is the delivery plan for the wider Leicestershire Together Sustainable Community Strategy which covers a slightly longer period up to 2013. The Economic Development and Enterprise Delivery Block includes detailed delivery plans that aim to deliver a more prosperous, innovative and dynamic economy. Blaby Town Centre is identified as a "priority centre" for improvement action within the LAA.

Draft Leicester and Leicestershire Multi-Area Agreement 2009-2020 (MAA)

6.1.29 The MAA focuses on economic development and provides the opportunity to align the LAAs for Leicestershire and Leicester City. The high level

objective is to improve the economic performance of the sub-region with specific priorities set within three Economic Development themes : Business and Enterprise, Employment and Skills and Infrastructure. Objectives are set to deliver a dynamic, enterprising and prosperous economy, to realise attractive public realm and built environments including retail centres and to provide support to improve the attractiveness of market towns, other urban settlements and rural centres.

Leicester Shire Economic Partnership (LSEP) and Leicester and Leicestershire Economic Development Company (LLEDC)

- 6.1.30 The LSEP will be dissolved by 31 March 2009. LLEDC will become operational on 1 April 2009 as the delivery agent for the Leicester and Leicestershire Economic Development Strategy combining the economic development strategies articulated in the City and County Sustainable Community Strategies. The LLEDC will drive forward the delivery of MAA priorities and targets.

Blaby Sustainable Community Strategy 2008

- 6.1.31 The Vision for 2026 sets the objective of a District that is known for its clean, attractive and sustainable environment, where the economy is prospering and prosperous and where the physical environment across the whole of the District makes people proud. Within the Action Plan a critical project is identified to increase the vibrancy and prosperity of local shopping centres.

7. Other Relevant Considerations

- 7.1 None relevant to this report.

8. Other Options Considered

- 8.1 Implementation of the Masterplan proposals could be deferred but this option is not recommended as the Town Centre environment is tired and dated. It needs a regeneration plan to start now to help it compete with other neighbouring centres, including South Wigston, Wigston and Oadby, which are implementing regeneration and Masterplan projects of their own. "Early Wins" have been identified for delivery within the next 2 years and these have been discussed at the Public Consultation events. A delay in implementation would lose the momentum generated at these events.
- 8.2 To implement only part of the Masterplan's recommendations. This is rejected as the projects have already been selected in order of priority to give the minimum 12 Priority Projects comprising an integrated regeneration plan to enable the Vision of the Masterplan to be realised. In addition there may be other uncontrollable factors, such as landowners not relinquishing land, that prevent some of the projects being delivered.
- 8.3 To prepare a Blaby Town Centre Area Action Plan. This would be a Development Plan Document which would be the subject of more public consultation and an independent Examination. This would be both a lengthier and more expensive process and is consequently rejected.
- 8.4 Not to prepare a Blaby Town Centre SPD. This would save both time and

resources, but would carry less weight in discussions with developers, in particular when negotiating S 106 Obligations.

9. Appropriate Consultations

9.1 Extensive consultation has been carried out in the preparation of the Masterplan.

10. Financial and Efficiency Implications

	Current Year	2009/2010	2010/2011
Revenue – Staffing Costs – P/T Town Centre Manager		£15,000	£15,000

Indicative Potential Future Costs

Capital – BDC contribution towards town centre core public realm improvement project (Option 1)	£50,000	£60,000	
Or Capital – BDC contribution towards Transport Study and first phase of town centre core public realm improvement project (Option 2)		£20,000	£200,000
Capital BDC contribution towards Bouskell Park, commissioning of development brief		£20,000	
Revenue – Consultants fees for SPD/SA		£12,000	

The salary for the Part Time Town Centre Manager post can be met from revenue reserves.

The capital cost for the current year relates to this Council's provision towards implementing initial improvement works which is currently unspent. Estimates for 2009/10 and 2010/11 relate to this Council's contribution towards the town centre core public realm improvement project to contribute to funding that may be attracted from LCC and LLEDC (a level of 50% funding has been assumed). For Option 2 the higher level intervention scheme a further £200,000 may be required from this Council to complete the proposed public realm works in 2010/11.

Consultants could be engaged to undertake preparation of the SPD. A Sustainability Appraisal would also be required. This would need to be the subject of a growth bid for 2009/10.

11. Appendix to this report

- 11.1 Extracts of Blaby Town Centre Masterplan Report, Sections 8, 9 and 10.

12. List of Background Papers

- 12.1 Blaby Town Centre Masterplan Report October 2008.
- 12.2 Blaby Town Centre Masterplan Baseline Report October 2008.
- 12.3 Blaby Sustainable Community Strategy 2008.
- 12.4 Leicestershire Together Sustainable Community Strategy (2008).
- 12.5 Draft Leicester and Leicestershire Multi-Area Agreement 2009-2020 (MAA).
- 12.6 Leicestershire's Second Local Area Agreement 2008-2011.

The following Officers/Members have been consulted (identified by ✓):

- Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- Monitoring Officer** (Legal Services Manager)
- Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

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APPENDIX 1

8. Priority Projects

- 8.1. The Projects and Masterplan Section includes 25 projects, of varying scale and contribution to the Vision, some of which may not be able to be delivered within the next 15 years. This section summarises 12 Priority Projects, on which it is recommended that the Steering Group principally focus on. These should be seen as the minimum extent of projects that should be progressed to deliver comprehensive regeneration of the Town Centre. If these 12 projects are successfully delivered then it is believed that the Vision will be realised.
- 8.2. The rationale for prioritising the projects has been explained in The Projects and Masterplan Section of this report. The 12 projects are all identified as either Transformational or High Priority Projects.
- 8.3. The **Transformational Projects** are important as they will deliver real physical change that will enable perceptions of the Town Centre to be altered and provide new uses and destinations. All four Transformational Projects have been identified as Priority Projects.
- 8.4. **‘Early Wins’** are also important because they deliver change in a timescale that allow residents and users of the Town Centre to see that the Masterplan is being progressed and for confidence and momentum gained during the Consultation process to continue. Early Wins are projects that it is considered could be delivered within 2 years of inception. 6 Early Win projects have been identified. A further 2 are projects that have longer term elements but also elements within them which can be delivered as Early Wins. For more detail refer to the Masterplan Projects Matrix (figure 5.1)
- 8.5. The 12 Priority Projects comprise:

Project	Priority	Timescale
D2. British Legion/ Sycamore Street/ The George	Transformational	Long
D3. John’s Court	Transformational	Long
D4. Bouskell Park	Transformational	Long
E1. Town Centre Core	Transformational	Early Win
D1. Sycamore Corner	High	Early Win

E2. Blaby Gateways	High	Early Win
E4. The Pinfold	High	Early Win
E5. Jitties Enhancement	High	Early Win
A1. Car Parking Strategy	High	Early Win / Long
A4. Movement Pattern	High	Early Win / Medium / Long
N1. Blaby Day	High	Medium
N3. Town Centre Champion	High	Early Win

8.6. For further detail on these Projects the relevant sections of this report should be consulted (Projects and Masterplan; Transport Strategy; Transformation Projects). The Masterplan Project Matrix also provides a useful summary.

8.7. The ‘Making It Happen’ and ‘Next Steps’ sections provide detailed advice on viability and deliverability on all projects. In order to focus the mind, the table below summarises the initial actions required by the Steering Group for each of the 12 Priority Projects.

Project	Key Initial Actions
A.1. Car Parking Strategy	Consultation with Highways Authority. Consultation with Town Centre Businesses Prepare Car Parking Strategy document.
A.4. Movement Pattern	Commission Traffic Modelling. Consultation with Highways Authority.
D.1. Sycamore Corner	Discussions with Blaby Art & Print. Detailed Design and Specification.
D.2. British Legion/Sycamore Street/The George	Initial discussions with landowners. Prepare Development Brief.

D.3. John's Court	Initial discussions with landowners. Prepare Development Brief.
D.4. Bouskell Park	Confirm land ownership and legal issues. Ascertain potential funding sources Discuss with LCC Museums, Arts and Records Service Prepare Brief for Design Competition.
E.1. Town Centre Core	Consultation with Highways Authority Detailed Design and Specification
E.2. Blaby Gateways	Consultation with Highways Authority. Detailed Design and Specification.
E.4. The Pinfold	Confirm land ownership. Detailed Design and Specification.
E.5. Jitties Enhancement	Confirm land ownership. Detailed Design and Specification. Highways Authority need to be consulted.
N1. Blaby Day	Create organising committee. Prepare brief for local events
N3. Town Centre Champion	Define membership of group. Define roles, responsibilities etc.

9. Making it Happen

- 9.1. The following paragraphs focus on how the Transformational Projects could be delivered. Whilst the regeneration and urban design principles behind the schemes may be sound, unless there is confidence that the funding and mechanisms exist to deliver these projects then they will not achieve the Vision as set out in section 3.

D2: The British Legion, Sycamore Street and The George Car Park.

- 9.2. Combining the British Legion and George Public House car park sites will create a new mixed-use site in the centre of Blaby, near to one of the Town's existing perceived 'centres' (at the Forge Corner). The site could accommodate 2200 sq.m of retail and A3 units at ground floor, and 1000 sqm of commercial office space at first floor. 62 new car parking spaces will also be provided in a basement car park.
- 9.3. The scheme will create a new public square with a walkway linking Lutterworth Road and Sycamore Street. This will promote pedestrian links around the Town Centre and make Sycamore Street more accessible. The new units will encourage A3 businesses into the Town Centre, improving the evening economy offer and making the Town Centre more vibrant.
- 9.4. Discussions with property professionals suggest that there is a limited office market in the Town Centre. However, similar local settlements (such as Enderby) have supported smaller office-type schemes and therefore there is scope for some office development in Blaby, particularly if properties are offered as freeholds. The Town's proximity to the motorway network is also an advantage to any office development.
- 9.5. Discussions with the British Legion have confirmed that they would, in principle, be willing to sell their land and property. Discussion with the owners of The George public house (who also own its car park) is required to ascertain their willingness to cooperate in the scheme. At present the car park is for use by patrons of the pub only, and appears to be relatively underused (it was only 10 a.m. at the time that car parking surveys were undertaken).

Risk	Means of addressing the risks
Acquisition of The George car park	Discussion with landowner required
Possible lack of demand for new offices	<p>Office demand analysis and discussions with businesses who have requirements for office space within the Town Centre and nearby areas</p> <p>Discussions with developers to identify areas of demand and desirable property sizes and designs</p>

D3: John's Court

- 9.6. The project combines the redevelopment of the existing shopping precinct with the development of community facilities and a public library at first floor level. It will provide a defined focal point for Blaby, as well as a focus for pedestrian flows. Retail development is to be focused around a large area (1600 sqm) of public space that could also serve as an open market event space (and could be linked to Blaby Day and the Farmers Market ideas).
- 9.7. The scheme will also provide a more prominent position for the Town's library and, combined with new community facilities, will create a community hub for the Town. Significant car parking is provided (177 spaces), which introduces an additional 56 spaces to what is presently provided at the precinct. It is a response to the comments of local businesses, who highlighted the need for additional parking spaces in the Town as a priority. The redevelopment also provides the opportunity for more modern retail floorspace that will reinforce the retail offer in Blaby.
- 9.8. The project involves the redevelopment of the existing shopping precinct (14 retail units), including the upper floor residential accommodation and the expansion of the existing foodstore. The proposal would change the retail mix through the introduction of a number of larger floorplates and kiosk type units.
- 9.9. Delivery of this Transformational Project poses a significant challenge, in terms of property acquisitions and associated compensation. The ownership and occupation interests of the retail properties are complex, involving local and non-local investors; owner occupiers and leasehold occupiers. There are also a number of residential properties that would be required for demolition, with the need to re-house and compensate the occupants. The high level of occupancy at the precinct adds to the challenge to be faced.
- 9.10. Consultations with the retail property owners have generated a polarised response. Whilst some have been cooperative, and are receptive to discussions about the proposals, others have stated clearly that they are not interested at all in considering disposals to facilitate redevelopment.
- 9.11. Discussions with Waitrose has indicated that they would not be interested in examining the possibility of expanding their foodstore. One point raised by Waitrose is that, although they would support the proposal for decked parking above the store, the shape of the car park will need to be more regular than proposed in the plans.
- 9.12. Discussions with property professionals suggest that there is limited demand for retail units. Although the local population is likely to be able to support a larger supermarket, the proximity of Fosse Park means that comparison shops are unlikely to be attracted to the Town. Consultation with retailers contradicts this to a degree, as Fosse Park does not appear to be affecting local shops.
- 9.13. The stability of the occupancy levels within the Town Centre means that there is limited property transaction data available, from which values and rents can be gathered. However in July 2006, the sale at auction of 1

John’s Court realised £367,500 (a yield of 4.08 percent), which was almost 50 percent higher than the guide price. The property is subject to a lease running to August 2016. Within the past twelve months, only one new retail unit (on the northern edge of the Town Centre) has been marketed, at a rental of £10.34 per sqft.

9.14. John’s Court car park and Blaby Library are publicly owned and so site acquisition should not be a barrier to development. Additional costs will depend on the number of retail properties that need to be purchased as part of this project. The purchase of such properties is expensive and requires the compensation of both ground and first floor tenants. However, as long as the number is kept as low as possible, it should not provide a serious barrier to the development.

9.15. One concern raised has been regarding the loss of the southern access road to John’s Court car park. The northern access road is currently one-way and is, at times, difficult to access because of parked cars and a bus stop located near to the entrance. Although moving the bus stop and altering the road to a two-way flow may address this, it is something that needs to be investigated further. There is also an issue of servicing and delivery vehicles having to use the same entrance as shoppers and visitors.

9.16. Another possible area of conflict is the development of decked parking opposite to the existing housing on Holly Grove. Objections in the Planning Process are likely if designs are not sensitive to neighbouring residents, but these could be addressed with a good standard of engagement at all stages of the Planning Process.

Leicestershire County Council (LCC)

9.17. LCC owns Blaby Library. The current library is in moderate condition, however it has poor presence in the Town as it is hidden away behind Lutterworth Road’s shops. Consultation with LCC established they would be happy to discuss the possibility of relocating; however the practicability of such a move would depend on how it would be financed.

Risk	Means of addressing the risks
Acquisition of a large numbers of shops may make the project financially unviable	Working with existing owners and occupiers to promote the advantages of the redevelopment
Possible lack of demand for retail units	Retail capacity analysis and discussions with retailers who have requirements for space within the Town Centre.
Acquisition of Leicestershire County Council property	Continuing discussion to agree terms and investigate funding sources for relocation of Library
Objections from adjacent residential neighbours	Sensitive design, understanding the local context

Access issues for shoppers/community facility users	Investigate possibility of moving the bus stop
Access issues for delivery and service vehicles	Negotiate terms of planning permission to allow deliveries early in the morning or late at night to avoid creating congestion

D4: Bouskell Park

- 9.18. This project would provide a 350 sqm café, 550 sqm of exhibition space and 63 car parking spaces. It will create a new focal point for the Town in a park that is already relatively well used by walkers and families.
- 9.19. Although the building will be developed on open space (which may cause objections from conservationists or resident groups) most of the land comprises redundant allotments. Therefore the scheme will bring unused space back into use. It may also be possible to incorporate the Blaby Heritage Museum within the exhibition space – something that has very strong local support and would be both a visitor and community attraction, bringing additional people into the Town.
- 9.20. Funding opportunities may include the lottery as well as a variety of more locally based funding streams including County Council Museums and the Arts and Records Service. The café would be privately run, and together with the exhibition space, will encourage people to stay longer in the park and Town.
- 9.21. This project is the most sensitive of the developments as it involves an area of existing parkland. Therefore the new building design needs to be particularly sensitive to its surroundings.

Risk	Means of addressing the risks
Reliant on Lottery funding	Examine possible alternative funding
Loss of open space resulting in objections from conservationists and residents	Liaison with groups to gain support . Sensitive sustainable design complementing natural landscape.

E1: Environmental Enhancements and Public Realm Works

- 9.22. This project focuses on improving Blaby’s public realm, particularly concentrating on upgrading pedestrian

footways, installing artwork at Town gateways and planting street trees to improve the attractiveness of the Town. Improvements are also proposed for two of the other key projects at the John's Court and British Legion sites. This will involve creating two public squares, producing high quality and useable public space. These improvements will therefore be developed as part of these projects.

9.23. Another public realm improvement proposed for the Town is at the corner of Welford Road with Sycamore Street – the Pinfold. This land is registered common land, which may lead to complications. All other improvements focus on the highways, and therefore the viability and deliverability issues will be considered by Faber Maunsell.

10. Next Steps

10.1. This Report sets out The Vision for Blaby Town Centre, with the Masterplan and Projects that will deliver this. The previous section describes the issues involved with delivering these projects.

10.2. A number of actions will be required from the project partners before the Masterplan proposals can be implemented. The following points describe our recommendations for the way forward:

- A special partnership body (the '*Town Centre champion*') should be formed consisting of public sector partners, other key landowners and key stakeholders. This could either be a development of the Masterplan Steering Group or another body with the specific remit of delivering this Masterplan. The existing Blaby Town Centre Business Forum could form the basis of this group as well as other local landowners. The group should drive and control the delivery strategy and ensure that design quality and the principles of the Masterplan are upheld.
- A clear strategy and programme of works should be prepared by the partnership to co-ordinate delivery and implementation. This should clearly identify phasing, responsibilities and budgets.
- A phasing programme needs to be developed which will consider such issues as property market implications, potential disruption to Town Centre businesses, access implications and continuity of ample parking provision.
- Specific development briefs will need to be written for the key development sites (i.e. John's Court, British Legion Site), providing a greater level of detail than that provided here but reflecting the proposals and principles in this document. These should be capable for use as promotional tools to seek developer partners etc.
- The visitor centre/café building for Bouskell Park is subject to greater control as most of the site is public-sector owned. It is recommended that the development of this site is subject to a design competition, to ensure that an iconic structure emerges. A strong design brief needs to be written for this purpose.
- Detailed design work is required for the public realm strategy. This will generate a comprehensive set of proposals and a realistic assessment of costs. These proposals will need to be carefully co-ordinated with the transport strategy and the development of adjoining sites. The extent of works that will be delivered by Blaby District Council and those which will be delivered as part of the site development proposals needs to be carefully considered, although most of these works will be developed by the public sector. It is recommended that most of the public realm areas are adopted by the Highways Authority and an effective management and maintenance programme must be prepared.
- The Transport Strategy needs to be supported by detailed analysis and testing including traffic modeling, detailed design of roads and junctions and accurate costings. The Strategy ultimately needs to be approved

by the County Council as the Highways Authority and driven forward by them, in partnership with the District Council. The Parking Strategy needs to be carefully considered, phased and implemented. All of this should be considered in the context of the wider Town Centre context and movement pattern.

- There are a number of sites in private ownership proposed for redevelopment or refurbishment. Landowners should be contacted early and engaged positively in the process. The District Council should work with a developer partner for site assembly. Compulsory Purchase Order powers are available as a last result but if this is necessary then the process should be started early enough so that the programme is not affected.
- An effective Marketing and Communication Strategy should be developed to promote and communicate the Masterplan. This will have a number of strands and will include the marketing of sites and opportunities to potential developers, communication to existing businesses and residents and wider public consultation. The timing and extent of information released when, and to whom, should be carefully considered. It will be important to engage effectively with stakeholders and businesses in a two-way process and to promote the Masterplan positively to the public. This latter strand should be accessible and easily understood, and should also make use of a website. A professional PR or consultation company may be employed to best undertake this important work.
- The Masterplan should be seen as a development control tool, ensuring that proposed development in the Town Centre contributes to, and does not prejudice, its aims. The Masterplan should also be used to seek appropriate Section 106 funding for its projects from relevant planning applications.

BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Blaby District Local Development Framework: Annual Monitoring Report (2007/2008)
Report of:	Corporate Head of Policy & Partnerships
Status:	Public

1. Purpose of Report

- 1.1 To seek Cabinet Executive's agreement of the Local Development Framework: Annual Monitoring Report (AMR) 2007/2008 for submission to the Secretary of State before 31 December 2008.

2.	<u>Recommendations</u>
2.1	The Local Development Framework (LDF) Annual Monitoring Report (AMR) 2007/2008, attached to this report as Appendix 1, be submitted to the Secretary of State.
2.2	The Corporate Head of Policy and Partnerships be authorised to add information concerning policy monitoring to the AMR 2007/2008 prior to its submission to the Secretary of State.
2.3	That the Informal Local Development Scheme Timetable, shown as Appendix B of the AMR 2007/2008, be made available as the current guide to the preparation of Local Development Documents and that this be updated as necessary.
3.	<u>Reasons for Decisions Recommended</u>
3.1	The LDF Annual Monitoring Report must be submitted to the Secretary of State by 31 December 2008 in order to meet the requirements of The Town and Country Planning (Local Development) (England) Regulations 2004.
3.2	The Annual Monitoring Report is not yet complete, however, there is an opportunity between the meeting of Cabinet Executive on 1 December 2008 and the closing date for the submission of the AMR to include additional monitoring information.
3.3	To provide real time public information on progress with Documents in accordance with the advice contained in Planning Policy Statement 12 'Local Spatial Planning'.

4. Forward Plan

4.1 Forward Plan Reference Number: 05/08(821).

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 Background

6.1.1 The Planning and Compulsory Purchase Act 2004 requires every Local Planning Authority to produce an Annual Monitoring Report (AMR) as part of the Local Development Framework. The AMR should contain information about the implementation of the Local Development Scheme (LDS) and the extent to which the milestones in the LDS are being achieved. The AMR should also monitor the performance and effects of LDF policies. The AMR should cover the period from 1 April to 31 March and be submitted to the Secretary of State by 31 December each year.

6.1.2 The required content of the AMR is set out in Regulation 48 of the Town and Country Planning (Local Development) (England) Regulations 2004 and in the ODPM document entitled Local Development Framework Monitoring: A Good Practice Guide (March 2005).

6.1.3 The Government has stated that where an eligible Development Plan Document is not delivered in accordance with the Submission and Adoption milestones of the Local Development Scheme a reduced percentage of the Housing and Planning Delivery Grant (HPDG) will be allocated.

6.1.4 The two key messages of this report are; firstly, the District no longer has a 5 year supply of residential land, which needs addressing, secondly, that in order to maximise the Council's prospects of Housing and Planning Delivery Grant, work needs to continue to focus on preparing the submission version of the Core Strategy.

6.2 The Blaby District LDF Annual Monitoring Report

6.2.1 The key tasks taking into account advice in Planning Policy Statement 12: Local Spatial Planning, the Regulations and the ODPM Good Practice Guide are listed below:

- Review actual progress in terms of Local Development Document preparation against the timetable and milestones in the Local Development Scheme;
- Assess the extent to which policies in Local Development Documents are being implemented;
- Where policies are not being implemented, explain why and set out what steps are being taken to ensure that the policy is being implemented or identify whether the policy is to be amended or replaced;

- Identify the significant effects of implementing policies in Local Development Documents and whether they are as intended; and
- Identify whether the policies need to be amended to reflect changes in national or regional policy.

6.2.2 A copy of the Annual Monitoring Report, as proposed to be submitted to the Secretary of State, is attached to this report as Appendix 1. **(N.B. The AMR is not yet complete. Additional monitoring information will be included before submission. The areas within the AMR which are highlighted yellow need to be revised to represent the monitoring year 2007/08.)**

6.2.3 The AMR is essentially in two parts; the “Local Development Scheme” and “Policy Implementation”.

6.2.4 **The Second Local Development Scheme 2007 (LDS)**

6.2.4.1 The LDS in place for the period 2007/2008 was the Council’s second LDS, which was brought into effect on 31 May 2007. It programmed the following documents for preparation during the above period (see Appendix A of the AMR):

- **Core Strategy**

Work commenced on the Core Strategy in July 2007, in accordance with the milestone set out in the second LDS.

- **Affordable Housing Supplementary Planning Document (SPD)**

This document was programmed to commence in December 2007. The evidence necessary to support the SPD will be provided by three studies; the ‘ Blaby District Housing Needs and Market Study’, a ‘Strategic Housing Market Assessment’; and a ‘District level Housing Market Assessment ‘. The first of these studies, which was commissioned independently by this Council, was completed in July 2005; the final version of the second study, which is a joint project involving all Leicester and Leicestershire Authorities, is expected imminently; the final version of the third study, led by this Council’s Housing Services Division, is expected in the near future. It would also be beneficial to have an Affordable Housing Economic Viability Assessment, as this is an issue on which the Planning Inspectorate currently appears to be placing considerable emphasis. Work is consequently yet to commence on the SPD.

6.2.5 **An Informal Local Development Scheme Timetable**

6.2.5.1 Although outside the monitoring period of this AMR (April 2007 to March 2008), it is considered appropriate to provide the most up to date position regarding the preparation of LDF documents within this report.

6.2.5.2 It became apparent earlier in 2008 that the programme in the Second LDS would not be achieved. This was largely attributable to two reasons; staff

shortages in the Planning Policy Team and a delay in the publication of the Secretary of State's Proposed Changes to the Regional Plan. Consequently discussions were held with the Government Office for the East Midlands (GOEM) in August and October 2008 to remedy this position. GOEM advise that the Secretary of State is reluctant to agree to revised LDS and may direct that these are not brought into effect. It has been suggested that an 'informal LDS timetable' may be the best way to achieve targets.

6.2.5.3 An informal timetable which shows the updated programme for the production of LDF documents has been prepared (see Appendix B of the AMR). This reflects the Council's current priorities.

- **Core Strategy**

This remains the Council's highest priority LDF document. Public consultation on an 'Alternative Options' paper commenced on 6 November and will end on 18 December 2008. Submission to the Secretary of State is programmed for September 2009 compared with December 2008 in the LDS (2007). Part of this slippage is due to changes in Regulations.

- **Allocations and Designations DPD**

This Document has been reprogrammed to reflect the revisions to the programme for the Core Strategy. It will now commence in May 2010, not August 2009.

- **Affordable Housing SPD**

Commencement of this document has been moved back to March 2009 to allow a greater focus on the Core Strategy.

- **Sustainable Urban Extension and Strategic Employment Site SPD**

This Document has been reprogrammed to reflect the revisions to the programme for the Core Strategy. It will be necessary for the Council to be certain which areas will be confirmed as the most sustainable locations for both the SUE and the SES before it prepares SPD. This will not be known until it is in receipt of the Inspector's report following the Examination of the Core Strategy.

- **Blaby Town Centre Masterplan SPD**

The Masterplan is the subject of a separate report to Cabinet Executive's meeting of 1 December 2008. It is not currently included in the Local Development Scheme as SPD. However, adopting this as a SPD will give the Masterplan greater weight, in particular when seeking to negotiate contributions from developers via S106 Agreements for improvements to the Town Centre. Should the Council wish to follow this course of action it will need adding to the Informal Timetable.

6.2.6 **LDF Studies**

6.2.6.1 The Council continues to undertake a number of studies, both independently and in partnership, which will contribute to the “evidence base” for its Core Strategy and other LDF documents.

6.2.6.2 Studies completed to date

- Housing Needs and Market Study;
- Urban Capacity Study;
- Employment Land Study;
- Gypsy and Travellers’ Needs Study;
- Leicester and Leicestershire Housing Land Availability Assessment (Principal Urban Area);
- Strategic Flood Risk Assessment;
- Landscape Character Assessment;
- Renewable Energy and Climate Change;
- Strategic Employment Land and Premises Study;
- Blaby Town Centre Masterplan; and,
- Village Services Factfile.

6.2.6.3 Studies currently in preparation:

- Open Space, Sport and Recreation Assessment;
- Leicester and Leicestershire Housing Market Assessment;
- Strategic Housing Land Availability Assessment;
- Retail and Town Centre Study;
- Biodiversity Study; and
- Leicester and Leicestershire HMA Workspace Study.

6.2.7 **Housing Land Supply**

6.2.7.1 Past and projected housing completion rates are currently on track to meet the Leicestershire, Leicester and Rutland Structure Plan requirement of 4650 dwellings (1996 – 2016). The Government’s Planning Policy Statement 3: Housing requires Local Planning Authorities to identify and maintain a continuous 5 year supply of deliverable housing sites. The Council currently has a 6.8 years supply of housing based on the Structure Plan. However, the Regional Plan for the East Midlands also has to be taken into account.

6.2.7.2 The Regional Plan for the East Midlands (RSS 8) is currently in a state of flux and this gives rise to two housing supply scenarios; one based on the requirements set out in the existing Development Plan (RSS8 / Structure Plan) and the other based on the emerging Regional Plan requirements from 2001-2026. Both scenarios can be seen in the Housing Trajectory on page 19 of the AMR. It is notable that Inspectors at Planning Inquiries are now giving significant weight to the emerging Regional Plan, which has been the subject of the Secretary of State’s Proposed Changes and is not therefore expected to alter in any material way prior to its adoption.

6.2.7.3 The Council has recently undertaken a robust assessment of the deliverability of all sites included within the 5 year residential land supply total of 845 as at 31st March 2008 (see RLA 2008) for planning appeals

involving land at Countesthorpe and Blaby. Due to the current housing downturn many developers have effectively 'closed shop' to wait for more favourable market conditions. This has reduced the number of houses considered deliverable within the 5 year period 2008 – 2013 to 792. This coupled with the step change in housing delivery proposed in the emerging Regional Plan means **the Council can no longer demonstrate a deliverable 5 year supply of housing land** (see paragraph 6.5 on page 20 of the AMR). This reduces the ability of the Council to control development in accordance with its Local Plan.

- 6.2.7.4 Adoption of the emerging Regional Plan is imminent (expected in winter 2008/09). This will form part of the Development Plan and set the targets for housing delivery within the District of Blaby, resulting in an under provision of housing land within the District (2.8 years supply). PPS3 requires sites that are to be included in the 5 year supply to be suitable, available and achievable. **This Council therefore needs to agree an appropriate solution to its residential land availability shortage in order that it may demonstrate a 5 year land supply. Members will be advised of the recommended action in due course.**

6.2.8 **Policy Implementation**

- 6.2.8.1 In March 2007 the Council applied to the Secretary of State for a Direction under the Planning and Compulsory Purchase Act 2004 to extend certain "saved policies" of its adopted Blaby District Local Plan (BDLP) (adopted September 1999) whilst it prepares its Development Plan Documents.
- 6.2.8.2 The saved policies contained in the BDLP which the Secretary of State has agreed can be extended are listed in Appendix C of the AMR.
- 6.2.8.3 The Council is able to report on all Core Indicators identified by the Department of Communities and Local Government (DCLG).
- 6.2.8.4 There is an opportunity to use the period between the meeting of Cabinet Executive on 1 December 2008 and the closing date for the submission of the AMR to include further monitoring information.

7. **Other Relevant Considerations**

- 7.1 There is a risk that during the time taken to agree a solution to the residential land availability shortage further large scale residential planning applications may be received. Clearly the Council has no control over the latter, therefore it needs to use its best endeavours to arrive at a policy provision on land supply at the earliest opportunity.
- 7.2 There is also a risk that should slippage occur in meeting the submission and adoption milestones of the Core Strategy this may effect the amount of Housing and Planning Delivery Grant awarded to this Council. This risk will need to be minimised through project management.

8. **Other Options Considered**

- 8.1 The Planning and Compulsory Purchase Act 2004 and associated Regulations require the AMR to be submitted to the Secretary of State by 31

December 2008.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 The recommendation concerning the submission of the Annual Monitoring Report can be implemented with existing resources. **Further consideration needs to be given to the staff resources required to prepare the Affordable Housing SPD to meet the informal LDS timetable and for the work necessary to remedy the 5 year land supply shortage.**

11. Appendix to this report

11.1 Appendix A - 'Blaby District LDF Annual Monitoring Report 1st April 2007 to 31st March 2008.

12. List of Background Papers

12.1 The Town and Country Planning (Local Development) (England) Regulations 2004.

12.2 Planning Policy Statement 12: Local Spatial Planning.

12.3 Local Development Framework Monitoring: A Good Practice Guide.

12.4 Direction from the Secretary of State in respect of policies in the Blaby District Local Plan (September 1999) dated 21 September 2007.

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- Monitoring Officer** (Legal Services Manager)
- Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

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Blaby District
Local Development Framework
Annual Monitoring Report
1 April 2007 - 31 March 2008

Further Information

For further information on any of the information contained within this document please contact:

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Contents Page

1.	Executive Summary	Page 3
2.	Introduction	Page 6
3.	Monitoring Framework	Page 7
4.	The District of Blaby: A Contextual Profile	Page 10
5.	Local Development Scheme implementation	Page 14
6.	Policy Monitoring	Page 17
7.	Glossary	Page 28

Appendices

Appendix A: Local Development Scheme Programme Timetable (May 2007)

Appendix B: Informal timetable of the production of LDF documents

Appendix C: Schedule of Saved Policies contained in the Blaby District Local Plan (Adopted September 1999)

Tables

Table 1: Housing core indicators

Table 2: Business development/employment core indicators

Table 3: Transport and accessibility core indicators

Table 4: Local services core indicators

Table 5: Flood protection and water quality core indicator

Table 6: Biodiversity core indicators

Table 7: Renewable energy core indicator

Table 8: Gypsy and Travellers

1. Executive Summary

- 1.1 This Annual Monitoring Report has been produced by Blaby District Council under the Planning and Compulsory Purchase Act 2004. The document contains information on progress towards the milestones set out in the revised Local Development Scheme, May 2007, (LDS) and for the current monitoring framework.

Local Development Scheme:

- 1.2 The LDS in place for the previous monitoring year (2006/07) was the Council's first LDS, which was brought into effect on 27th June 2005. However, following comments received from the Government Office for the East Midlands regarding the Core Strategy (Preferred Options) Document it was necessary to revise the document. The revised LDS was brought into effect on 31st May 2007.
- 1.3 The first milestone identified in the revised LDS is commencement of the preparation of the Core Strategy. This took place in July 2007.

Policy Implementation:

- 1.4 A brief summary is provided below of the key findings from the core indicators for 2007/8;

Housing:

- Past and projected housing completion rates are currently on track to meet the Leicestershire, Leicester and Rutland Structure Plan (1996-2016) requirement of 4650 dwellings by 2014.
- 48% of all dwellings completed in 2007/8 were built on previously developed land.
- 8% of all new dwelling completions on large sites (10 or more dwellings) were completed at less than 30 dwellings per hectare. 76% of all new dwelling completions on large sites were completed at between 30 and 50 dwellings per hectare. 16% of all new dwelling completions on large sites were completed at above 50 dwellings per hectare.
- 58 affordable homes were completed in the District in 2007/8.
- The Council currently has a 6.8 year supply of housing based upon both the Leicester, Leicestershire and Rutland Structure Plan and a 2.8 year supply based on the Proposed Changes to the East Midlands Regional Plan (July 2008).

Business Development/ Employment:

- A total of 6,692m² of employment floorspace was developed in 2007/8; all of this was in employment areas.
- 1,320m² of employment floorspace (20%) was developed on previously developed land.
- A total of 26.25ha of land is defined as available for employment use in the District of Blaby. This is shown below according to land that has been allocated in the Local Plan and land with planning permission;

Allocated: – 6.19ha

Planning Permission:- B1(a): 9.89ha, B1 (b): 0ha, B1 (c): 0ha, B2: 0.39 ha, B8: 0.5ha, Mixed (more than just one use class): 9.28ha

- The shortfall in land available for employment is an issue being considered in both the preparation of the Council's Core Strategy and the Housing Market Area Employment Land Study being undertaken by PACEC Consultants commissioned Leicester Shire Economic Partnership.
- There were no employment land losses in 2007/08.

Transport and Accessibility;

- 2 out of a total of 4 (50%) non-residential completions complied with Blaby District Local Plan car parking standards.
- 100% of all residential completions were within 30 minutes public transport time of a GP, primary school, secondary school, employment area and retail area; and 95.9% of all residential completions were within 30 minutes public transport time of a hospital.

Local Services;

- 5,372m² of office development and 9,850m² of leisure development was completed in 2007/8.
- No retail, office or leisure development was completed within a town centre.
- Currently there are no open spaces in the District of Blaby managed to Green Flag award standard.

Flood Protection and Water Quality:

- One planning application was approved by this Council in 2007/8 which the Environment Agency had objected to on either water quality or flood protection grounds. The Environment Agency's objection to

application (07/0374/1/MX) was regarding the adverse impact on surface water runoff. The Application is for the erection of five office buildings (Class B1(a)) with associated access roads and car parking on the Lakeside Plot, Calton Park, Narborough. A condition was added to mitigate the surface water problem and the applicants are working with the Environment Agency to find an appropriate solution.

Biodiversity;

- There were a number of positive changes in priority habitats and species as well as areas designated for their intrinsic environmental value.

Renewable Energy;

- No renewable energy capacity was installed in the District in 2007/8.

Gypsy and Travellers;

- Blaby District provided 17 net additional permanent pitches and 0 transit pitches for gypsies and travellers.

2. Introduction

- 2.1 The Planning and Compulsory Purchase Act 2004 requires every Local Planning Authority to produce an Annual Monitoring Report (AMR) as part of the Local Development Framework. The AMR should contain information about the implementation of the Local Development Scheme (LDS), and the extent to which the milestones in the LDS are being achieved. It should also monitor the performance and effects of LDF policies. It should cover the period from 1 April to 31 March and be submitted to the Secretary of State by 31 December each year.
- 2.2 The required content of the AMR is set out in Regulation 48 of the Town and Country Planning (Local Development) (England) Regulations 2004, taking into account advice in Planning Policy Statement 12: Local Development Frameworks. The key tasks are listed below:
- review actual progress in terms of Local Development Document preparation against the timetable and milestones in the Local Development Scheme;
 - assess the extent to which policies in Local Development Documents are being implemented;
 - where policies are not being implemented, explain why and set out what steps are being taken to ensure that the policy is being implemented: or whether the policy is to be amended or replaced;
 - identify the significant effects of implementing policies in Local Development Documents and whether they are as intended; and
 - identify whether the policies need to be amended to reflect changes in national or regional policy.

3. Monitoring Framework

Local Development Scheme

- 3.1 The Local Development Scheme is monitored using the key milestones contained within the LDS detailed programme timetable. The LDS in place for the previous monitoring year (2006/07) was the Council's first LDS (June 2005). However, following comments received from GOEM regarding the Core Strategy (Preferred Options) the Council revised its LDS in May 2007 (see Appendix A). The milestones set out the different stages of preparation of each Local Development Document. If a document has not been prepared in accordance with the expected timetable then reasons for this must be given.

Policy Indicators

- 3.2 Monitoring the Local Development Framework requires a set of indicators to be developed in order to assess the policies. The purpose of the AMR is to monitor the impacts and implementation of the policies contained within the Local Development Documents (LDDs). However, Blaby District Council has not adopted any LDDs as yet. Prior to the adoption of LDDs, Blaby District Council is required to monitor the performance of all saved Local Plan policies. The Council submitted its intentions to save current policies beyond September 2007 in March 2007. The Secretary of State's direction stated that, from the 27th September 2007, 95 Local Plan policies were saved for an extended period and 25 policies were deleted. A schedule detailing the saved policies can be found in Appendix C.
- 3.3 Having identified the policies which will be monitored, it is then necessary to identify appropriate indicators, the aim of which is to provide specific markers against which the impacts of the plans and policies can be measured. Local Development Framework Monitoring: A Good Practice Guide (March 2005) (from here on in referred to as the Guide) identifies several different types of indicators which may be included as part of the monitoring framework; a summary of these is provided below:

Contextual Indicators:

- 3.4 Contextual Indicators provide the wider social, economic and environmental background against which the effects of the policies can be considered. These indicators should establish the baseline position against which all policy effects will be measured. It is stated in the Guide that the contextual indicators should be limited to the key characteristics of the area and where possible should be drawn from existing information about the locality. Six topics are identified in the Guide to assist Local Authorities in the identification of suitable contextual indicators; demographic structure, socio-cultural issues, economy, environment, housing and the built environment, and transport and spatial connectivity.

Output Indicators:

- 3.5 Output Indicators measure the physical activities that are directly related to, and are a consequence of, the LDF/ Local Plan policies. Output Indicators are divided into two groups:

Core Indicators are mandatory indicators identified by ODPM (now DCLG). These indicators must be included in the AMR and should provide the basis for all policy monitoring. A key monitoring indicator in this group is the housing trajectory. This provides information on housing policy and performance (in terms of net additional dwellings) in comparison with a specific target set for dwelling completions.

Local Indicators address issues that are not covered by the Core Indicators and should be selected according to particular significant local issues. These indicators should be chosen based on the availability of existing data.

Significant Effects Indicators:

- 3.6 Significant Effects Indicators must be linked to the objectives identified in the Sustainability Appraisal and again, should reflect the availability of existing data.

The Department of Communities and Local Government (DCLG) recommends that no more than 50 indicators are selected (approximately half of these are mandatory Core Indicators).

Policy Implementation

- 3.7 Having identified the policies to be monitored and established appropriate indicators, the next stage is to gather the information required and from this come to a conclusion about effects and impact of the policy in question.

Monitoring Framework for this Annual Monitoring Report

- 3.8 Indicators will be developed based on the availability of existing information and the correlation between the indicator and the Local Plan/ Local Development Framework policy. A summary of how this Council intends to develop each different type of indicator is provided below;

Contextual Indicators

- 3.9 A contextual baseline has been established and is provided in Section 4 of this report. If appropriate, in the next Annual Monitoring Report, Contextual Indicators will be developed based on this baseline information. The indicators will be linked to Local Plan policies.

Core Indicators

- 3.10 Information has been collected for all of the Core Indicators.

Local Indicators

- 3.11 Local Indicators will be developed in order to report on the implementation of Local Plan/ Local Development Framework policies. It is envisaged that in the immediate future this Council will be required to report on the performance of Local Plan policies and not the Local Development Framework.

Significant Effects Indicators

- 3.12 If relevant, Significant Effects Indicators will be developed based on the objectives and indicators identified in the Sustainability Appraisal Scoping Report. The indicators will be linked back to policies in the Local Plan.

4. The District of Blaby: A Contextual Profile

- 4.1 It is important to have regard to contextual information and baseline data when developing indicators and assessing the implementation of policies in the Local Development Framework. Contextual indicators are used to provide a backdrop against which to consider the effects of policies, taking into account the social, environmental, and economic issues that affect the District of Blaby.
- 4.2 The District of Blaby is located in the County of Leicestershire and lies to the south west of Leicester. It covers an area of 13,047 hectares (50 sq miles) and although not served by one principal town, there are 24 parishes that vary in population from 32 (Wigston Parva) to 14,981 (Braunstone). The northernmost part of the District is predominantly urban in character, whereas the south of the District is more rural in its activities and character.
- 4.3 The District of Blaby is well linked to major road communications. Both the M1 and M69 lie within the District and intersect at junction 21 of the M1. This is of major importance to industry and commerce and provides easy access to London, Birmingham and the North, along with airports such as East Midlands, Luton, Birmingham and Coventry. Local rail communications are good; the District is currently served by the Peterborough – Birmingham line with a railway station at Narborough.
- 4.4 Blaby is one of the prime locations for manufacturing and distribution in the country. The area around the M1/ M69 motorway intersection contains large scale commercial developments such as Grove Park, Meridian Business Park and Carlton Park. The area also has one of the most successful retail parks in the country; Fosse Park attracts approximately 100,000 shoppers each week from all over the Midlands.
- 4.5 As well as the built environment Blaby also has assets in its natural and built environment. The District is home to nine conservation areas, six Sites of Special Scientific Interest (SSSI) of both ecological and geological importance, and two areas of ancient woodland.
- 4.6 The latest estimate for the population of Blaby is 92,900 (mid 2007). Between censuses (1991-2001) there was an increase in population of 9.1%. This was the second highest population increase in the county and is far higher than the average for the East Midlands region (5.5%) and more than double the National average (4.4%). The population has generally continued to increase, albeit at a slower rate, in the period 2001- 2007. The number of households in the District has risen by 15% since the 1991 census. The dominant housing type in Blaby is Semi-Detached with 48.4% of all properties falling into this category; this figure is above the regional and national percentage of semi-detached dwellings (36.3% and 31.6% respectively). Blaby also has a relatively low number of terraced properties; at 9.7% this is the lowest percentage in the Leicestershire, and well below the percentage for the region (21.3%) and the Country (25.8%).

- 4.7 The largest ethnic group in Blaby is white, with 94.3% of the population falling into this category. The vast majority of the population of Blaby (95%) were born within the United Kingdom. The District has an average level of educational attainment compared to the East Midlands with 25.8% (source: ONS Jan 07 - Dec 07) of the population having an NVQ4 and above qualification. The percentage of people who have no qualifications (9.4%) is lower than the region and country as a whole. Unemployment in the District is extremely low; the unemployment rate is 1.3% (August 2008). This figure is lower than the national average of 2.5%. Income levels are good in Blaby District; it has higher earnings by residence than Regional and National averages.
- 4.8 On the whole, Blaby is a relatively prosperous area. In the 2007 Indices of Deprivation survey, Blaby was ranked 326 out of the 354 local authorities in England (with 354 being the least deprived), a decrease from 334 since 2004. Poor health is not a significant problem in Blaby with the majority of people stating that their health is either good or fairly good in the 2001 Census. The health profile for Blaby (NHS, 2006) confirms this, stating that life expectancy in Blaby is better than the England average and ill-health indicators suggest average or below average levels of illness. The percentage of people that have a limiting long term illness is lower than for the county, region and nation as a whole.
- 4.9 Crime levels in Blaby District are relatively low, with a rate of 35.5 crimes committed for every 1000 people compared to 42.8 in Leicestershire and 60.7 for England and Wales. Incidents caused by anti-social behaviour have reduced and 52% of residents also feel this to be the case.
- 4.10 The findings of the 2001 Census of Population show that the two biggest employment sectors in Blaby are manufacturing and the service sector. The percentage of people in Blaby that travel to work by car (either as a passenger or a driver) is 72%, which is similar to Leicestershire as a whole (71%). The next most popular mode of transport for travelling to and from work is the bus (7%), which is slightly higher than the county percentage of 5%. Blaby District experiences a net outflow of people travelling to work each day of -6,058, this means that more people leave the area to work than come in to the District to work. The reason for this net outflow is the District's good transport links and its close proximity to Leicester to where over 16,000 people commute to everyday (Source: 2001 Census).
- 4.11 The recent publication of the District of Blaby Sustainable Community Strategy (2008) sets out the long term vision for the District to 2026 and identifies areas of priority.

Vision

In 2026 Blaby District will be made up of thriving sustainable, safe, healthy, fair and secure communities, where people are happy to live and work. We want Blaby District to be known for:

Its clean, attractive and sustainable environment where:

- The economy is prospering and prosperous
- It is easy to get about using sustainable, integrated transport networks
- The physical environment across the whole of the District makes people proud
- We are doing everything we can to respond to the challenges of climate change
- People can afford to live in high quality, sustainable homes in strong communities

The safety, strength and health of its communities where:

- People work together to make their communities safer
- Anti-social behaviour is a thing from the past
- People from differing backgrounds and needs have the opportunity to be engaged in their community
- Communities and individuals have the skills and confidence to actively work together to shape their community
- All people are as healthy and active as they can be
- Older people are independent and enjoy a good quality of life

The contribution of its children and young people where:

- Children and young people make positive choices about their health and behaviour
- Young people are actively involved in planning and delivering improvements to services
- All children and young people can reach their potential

High quality, responsive, efficient and valued public services where:

- Agencies communicate and work together to provide customer focussed services
- Customers expect and receive the very best services

4.12 The contextual baseline and the Blaby Sustainable Community Strategy (2008) also identify specific issues affecting the District which should be taken into account when considering which indicators to include as part of the monitoring framework;

- Although the District is not a deprived area compared to the county, the region and the country, there are some parts that experience relative deprivation in contrast with the more prosperous areas of the District;
- The Junction 21 area experiences traffic congestion at certain times of the day and as a result of this, air and noise pollution is an issue in this area. Three Air Quality Management Areas have been set up around the Junction 21 area in response to this with two other areas in the District designated;

- Between March and June 2006 the Highways Agency carried out a public consultation on outline plans to widen the M1 motorway. The need to widen the M1 is based on the findings of the East Midlands Multi Modal Study (2002). Based on the results of this study the Secretary of State for Transport announced plans to widen the M1 in the East Midlands and in April 2004 M1 widening entered the Highways Agency's Targeted Programme of Improvements List as a priority project;

However, the strategy for delivering improvements on the M1 from Junctions 21 to 30 (either side of the widening currently under construction between Junctions 25-28) is currently under review;

Following the successful trial of Active Traffic Management (ATM) on the M42 and the publication on 4th March 2008 of the Department for Transport's "Advanced Motorway Signalling and Traffic Management Feasibility Study", the Secretary of State has requested that the Highways Agency assess the feasibility of an ATM solution on the M1. The review will determine whether ATM will provide a better value-for-money alternative for improving capacity and journey times on the motorway than widening to four lanes;

The ATM considerations will not resolve the particular problems at J21. However, the motorway programme is being re-framed in the light of the implications of the new technology, and until the extent and location that it can be applied is known, the programming of other parts of the work, such as relief for J21, will not be known;

- Dependence on the car is an issue as although the percentage of people who travel to work by car is similar to the Leicestershire average, this is still a significant number;
- There is a lack of affordable housing in the District as well as a lack of housing of the appropriate type;
- In October 2006 it was announced by DCLG that the Three Cities and Three Counties (Leicester, Nottingham and Derby and their respective Counties) Growth Point Bid had been successful. The housing requirements in the District will, however, be determined through the emerging East Midlands Regional Plan. The Secretary of State issued the proposed changes in July 2008 and the final version of the document is imminent. The proposed changes to the Regional Plan introduce a step change in housing delivery for the District of Blaby, requiring the delivery of 8650 dwellings between 2001 and 2026, with 5720 located within or adjacent to the Leicester Principal Urban Area (PUA). Some 4000 of the PUA requirement

should be delivered in the form of a Sustainable Urban Extension (SUE) to the West of Leicester;

- 46% of residents believe that facilities for teenagers in the District need improving and 52% feel that teenagers hanging around on the streets is a problem.

5. Local Development Scheme Implementation

- 5.1 The purpose of this section is to examine the progress of the Local Development Scheme and to assess if the timetables and milestones identified for document production have been achieved.
- 5.2 The first Local Development Scheme was brought into effect by this Council on 27 June 2005, following submission of the document to the Secretary of State on 27 May 2005. The document identified a three year programme for the production of Blaby District Council's Local Development Framework identifying the documents which will be produced and the timetable for the production of these documents. The Local Development Scheme identifies key targets and milestones which must be met in the preparation of the documents.
- 5.3 All of the milestones identified in the 2005 LDS were met up to April 2006, however, following comments received from the Government Office for the East Midlands regarding the Core Strategy (Preferred Options) Document it was necessary to revise the Council's LDS, although it was recognised that this would have a significant impact on the timetable for preparing other documents, the targets and milestones for which would not be met. The revised LDS was brought into effect in May 2007 (see Appendix A for the programme timetable).
- 5.4 However, significant delays in the publication of the Secretary of State's Proposed Changes to the Regional Plan coupled with the lack of staff resources during autumn and winter 2007/08 led to a departure from the LDS (2007) (see below for details). Following discussions with the Government Office for the East Midlands (GOEM) an informal timetable has been drawn up to show the updated plan for production of LDF documents (see Appendix B). For the purposes of this AMR the preparation of LDF documents are monitored against the milestones set out in the LDS (2007) in Appendix A.
- 5.5 Each document identified in the LDS (2007) is listed below, along with a brief overview of the progress made so far in its preparation and the expected timetable for future production:

Statement of Community Development (SCI)

- 5.6 The SCI outlines how the District Council will involve the local community in the preparation of the Local Development Framework, and at what stages the local community can become involved in the preparation of planning documents and the determination of planning applications.

5.7 The SCI was adopted by Blaby District Council on 4th July 2006.

[Core Strategy Development Plan Document](#)

5.8 The Core Strategy (CS) will set out the vision and spatial strategy for the future development of the District of Blaby. It will identify strategic sites for a Sustainable Urban Extension (SUE) of some 4000 houses and a hierarchy of the most sustainable settlements capable of accommodating development. A strategic employment site will also be identified.

5.9 The timetable for the Core Strategy is as follows:

- Commencement of document preparation: July 2007
- Public participation on preferred options document and formal SA report: May – July 2008
- Submission to Secretary of State and SA report: December 2008
- Pre-examination meeting: April 2009
- Commencement of the examination: July 2009
- Adoption and publication of the Document: February 2010

5.10 The milestone for the commencement of document preparation was met in July 2007. During the monitoring year 07/08 all milestones were therefore met with regards the Core Strategy. However, due to the reasons outlined in paragraph 5.4 above future milestones in the LDS 2007 will not be met. The informal timetable (Appendix B) shows an updated plan for the completion of the Core Strategy.

[Allocations and Designations Development Plan Document](#)

5.11 The Allocations and Designations DPD will, if land releases are necessary, allocate land for housing, employment and other forms of development in the District of Blaby.

5.12 The timetable for the Allocations and Designations DPD is as follows:

- Commencement of document preparation: August 2009
- Public participation on preferred options document and formal SA report: May – June 2010
- Submission to Secretary of State and SA report: January 2011
- Pre-examination meeting: July 2011
- Commencement of the examination: October 2011
- Adoption and publication of the Document: April 2012

[Affordable Housing Supplementary Planning Document \(SPD\)](#)

5.13 The Affordable Housing SPD will provide additional information in support of the Core Strategy DPD.

5.14 The timetable for the Affordable Housing SPD is as follows:

- Commencement of document preparation: December 2007

- Draft SPD and SA report issued for public participation. Copies sent to Secretary of State: May – July 2008
- Adoption and publication of document: December 2008

5.15 Due to the reasons outlined in paragraph 5.4 above a departure from the LDS was made and document preparation did not commence in December 2007. See informal timetable (Appendix B) for the updated programme.

[Sustainable Urban Extension and Strategic Employment Site Supplementary Planning Document \(SPD\)](#)

5.16 The Sustainable Urban Extension and Strategic Employment Site SPD will provide additional information in support of the Allocations and Designations DPD.

5.17 The timetable for the Sustainable Urban Extension and Strategic Employment Site is as follows:

- Commencement of document preparation: November 2010
- Draft SPD and SA report issued for public participation. Copies sent to Secretary of State: October – November 2011
- Adoption and publication of document: March 2012

[Proposals Map Development Plan Document](#)

5.18 The Proposals Map will illustrate all the proposals set out in the Development Plan Documents. Therefore the document will be prepared when other DPDs that allocate sites or identify site-specific allocations are adopted.

6. Policy Monitoring

Housing

Table 1: Core Indicators

Indicator description	Target	2007/08 achieved	Comments	Local Plan Policy
Housing Trajectory	139	329	See commentary below	N/A
Percentage of new and converted dwellings on previously developed land	60%	48%	Conversions include Change of Use at present	N/A
Percentage of new dwellings completed at less than 30 dwellings per hectare	Target to be developed	8%	Relates to large site (10 dwellings or more) completions 2007/2008	N/A
Percentage of new dwellings completed at between 30 and 50 dwellings per hectare	Target to be developed	76%	Relates to large site (10 dwellings or more) completions 2007/2008	N/A
Percentage of new dwellings completed at above 50 dwellings per hectare	Target to be developed	16%	Relates to large site (10 or more) completions 2007/2008	N/A
Number of affordable housing completions	A year on year increase in the number of affordable homes completed	58	This figure is the net affordable housing completions. These were wholly funded through developer contributions.	R4

6.1 The Housing Trajectory shows past dwelling completion rates and projected completions against the average annual requirements of the 'saved' Leicestershire, Leicester and Rutland Structure Plan (LLRSP) Housing Policy 1. Given the imminent publication of the Regional Plan the trajectory also shows the annual requirements from the Regional Plan Proposed Changes (July 2008). The trajectory shows that past completion rates have tended to exceed the average annual requirement of the LLRSP and that projected completions are also expected to exceed the LLRSP annual requirement. This Council expects to meet the LLRSP target of 4650 dwelling completions (1996-2016) by 31 March 2014. However, the proposed changes to the Regional Plan introduce a step change in the amount of housing required within the District of Blaby, some 8650 are to be provided between 2001 – 2026. Based on these figures the District of Blaby is likely to fall short of the housing

targets set and cannot demonstrate a 5 year land supply. The Council needs to agree an appropriate solution to its residential land availability shortage.

- 6.2 Projected completions in the Housing Trajectory are calculated based upon existing planning permissions, large brownfield windfall sites which are expected to make a significant contribution to the housing supply within 5 years and small sites which are 'deliverable' in the context of PPS 3. The Council has recently undertaken a detailed exercise (in October 2008) to assess whether, in the current economic climate, the 5 year supply figure of 845 (see RLA 2008) could still be considered 'deliverable' using the criteria outlined in PPS 3. The outcome was a reduction of some 53 dwellings giving a total 5 year supply figure of 792.
- 6.3 The number of affordable homes completed in 2007/08 has increased significantly compared to the previous monitoring year (06/07) with 18% of total completions classed as affordable houses.

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Blaby District Five Year Land Supply

6.4 In accordance with PPS3, Housing (2006) Local Authorities must demonstrate a five year supply of suitable sites for housing development. Using the housing figures identified in the Leicester, Leicestershire and Rutland Structure Plan, the land supply calculation is as follows:-

i)	Structure Plan requirement ¹	4650
ii)	Net completions 1996 – 2007 ²	3733
iii)	Balance remaining (i – ii)	917
iv)	Annual requirement (iii / 8)	115
v)	Five year requirement (iv x 5)	575
vi)	Programmed five year supply (vi + vii)	792
vii)	Number of years supply (vi / iv)	6.8

6.5 If the figures contained in the proposed changes to the East Midlands Regional Plan are used, the five year land supply would be as follows:

i)	Requirement 2001 – 2026 ³	8650
ii)	Requirement by 2013 ³	3030
iii)	Completions 2001 – 2008 ²	1613
iv)	Residual to deliver by 2013 (ii – iii)	1417
v)	Annual requirement to 2013 (iv / 5)	283
vi)	Blaby District 5 year deliverable supply	792
vii)	Number of years supply (vi / v)	2.8

Footnotes:

1 – see Leicester, Leicestershire and Rutland Structure Plan, 2005.

2 – see Housing Trajectory (pg. 19)

3 – see East Midlands Regional Plan proposed changes July 2008.

Business Development/ Employment

Table 2: Core Indicators

Indicator description	Target	2007/08 achieved	Comments	Local Policy	Plan
Amount of floorspace developed for employment by type: B1 (a) B1 (b) B1 (c) B2 B8 Mixed	Target to be developed	5,372 m ² 0 m ² 0 m ² 0 m ² 1,320 m ² 0 m ²	Large sites only (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	E7/E8/E9/E10	
Amount of floorspace developed for employment by type, in employment or regeneration areas: B1 (a) B1 (b) B1 (c) B2 B8 Mixed	Target to be developed	5,372 m ² 0 m ² 0 m ² 0 m ² 1,320 m ² 0 m ²	Large sites only (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	E7/E8/E9/E10	
The amount of floorspace by employment type, which is on previously developed land B1 (a), (b), (c) B2 B8 Mixed	Target to be developed	20% on PDL 0 m ² 0 m ² 1,320 m ² 0 m ²	Large sites only (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	E7/E8/E9/E10	
Employment land available by type Allocations*: Permissions: B1 (a) B1 (b) B1 (c) B2 B8 Mixed	Target to be developed	6.19 ha 9.89 ha 0 ha 0 ha 0.39 ha 0.5 ha 9.28 ha	Large sites only (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	E7/E8/E9/E10	
Losses of employment land in Employment/regeneration areas: Local authority areas:	Target to be developed	0 ha 0 ha	Large sites only (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	E4	
Amount of employment land lost to residential development	Target to be developed	0 ha	Large sites only (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	E4	

* There are currently four employment sites remaining that are allocated in the Local Plan. One of the sites is a former landfill which is still settling, the remaining three sites will be investigated in 2009 when the Employment Land Availability schedule is prepared.

Transport and Accessibility

Table 3: Core indicators

Indicator description	Target	2007/08 achieved	Comments	Local Plan Policy
Amount of completed non-residential development within Use Class Orders A, B and D complying with car-parking standards set out in the local development framework (amount and percentage)	Target to be developed	2 out of a total of 4 (50%) non-residential completions complied with the car parking standards set out in the Blaby District Local Plan (1999)	Non- residential completions were monitored using Council Tax NNDR new hereditament records for 1 April 2007- 31 March 2008. Planning application files determined if Local Plan car parking standards had been met. The low % of compliant planning applications is due to alternative arrangements being made to meet the required Local Plan standards. For Use Class B (employment sites) large sites only were monitored (Minimum threshold 0.2ha or 1000m2 floorspace) as included in the ELA Schedule 31 March 2008	T6
Amount of new residential development within 30 minutes public transport time of: a GP, a hospital, a primary school, a secondary school, areas of employment and a major retail centre (s)	Target to be developed	GP – 340 (100%) Hospital – 326 (95.9%) Primary School – 340 (100%) Secondary School – 340 (100%) Employment Area – 340 (100%) Retail Area – 340 (100%)	Residential completions for 2007 - 08 were mapped. Local knowledge of services/ facilities and the Traveline website were used to determine public transport times from the completed dwellings to each destination.	N/A

Local Services

Table 4: Core indicators

Indicator description	Target	2007/08 achieved	Comments	Local Policy	Plan
Amount of completed retail, office and leisure development	Target to be developed	Retail (A1): 0m ² Retail (A2): 0m ² Office (B1a): 5,372 m ² ** Leisure (D2): 9,850m ²	For Use Class B1a (office development) large sites only were monitored (Minimum threshold 0.2ha or 1000m ² floorspace) as included in the ELA Schedule 31 March 2008. The gross floorspace figure provided is as stated on the planning permission.	N/A	
Amount of completed retail and leisure development in town centres	Target to be developed	0m ²		S9/S10/S11	
Amount of eligible open spaces managed to Green Flag Award standard	0 (A target of 2 has been set for 2007-2008 in the Leicestershire Local Area Agreement)	0		N/A	

**** Completed office development (Use Class B1 (a)) is already included in the business development/ employment core indicator. Do not double count.**

Flood Protection and Water Quality

Table 5: Core Indicator

Indicator description	Target	2007/08 achieved	Comments	Local Policy	Plan
Number of planning permissions granted contrary to the advice of the Environment Agency on either flood defence grounds or water quality	0	1	The Environment Agency's objection to application (07/0374/1/MX) was regarding the adverse impact on surface water run-off. The application was for 5 office buildings. A condition was added to mitigate the problem and the applicants are working with the Environment Agency to find an appropriate solution.	CF5/ CF6 [#]	

[#] = as of 27th September 2007 this policy is no longer part of the Blaby District Local Plan. These policies are however, covered in National and Regional policy documents.

Biodiversity

Table 6: Core Indicators

Indicator description	Target	2007/08 achieved	Comments	Local Policy	Plan
Change in priority habitats and species (by type)	Target to be developed	See Tables Below	Information provided by the Partnership for Environmental Protection (PEP)/ Leicestershire County Council	CE18#/CE19 CE20#	
Change in areas designated for their intrinsic environmental value including sites of international, national, regional, sub-regional or local significance	No negative change	See Table Below	Information provided by the Partnership for Environmental Protection (PEP)/ Leicestershire County Council	CE19/ CE20# CE21/ CE18# CE23/ CE24	

= as of 27th September 2007 this policy is no longer part of the Blaby District Local Plan. These policies are however, covered in National and Regional policy documents.

Change in Priority Habitats and Species by type

Priority Habitats newly recorded

Habitat Type	Area in Hectares
Calcareous grassland	1.62
Spring & flush	0.09
Mixed woodland	0.57
Neutral grassland	5.93
Improved grassland	0.88
River	700
Canal	1110
Ancient Tree	4.76
Ancient tree	3.6
Ancient tree	4

Change in Priority Species by type

Leicestershire Biodiversity Action Plan (LBAP) Species

Species Type	Latin Name	Number of new occurrences
Barn Owl	<i>Tyto alba</i>	3
Bluebell	<i>Hyacinthoides non-scripta</i>	1
Chiroptera	Chiroptera	1
Common Pipistrelle	<i>Pipistrellus pipistrellus</i>	1
Common Redstart	<i>Phoenicurus phoenicurus</i>	6
European Water Vole	<i>Arvicola terrestris</i>	1
Freshwater Crayfish	<i>Austropotamobius pallipes</i>	1
Pipistrellus	<i>Pipistrellus</i>	1
Sand Martin	<i>Riparia riparia</i>	10
Water Vole	<i>Arvicola terrestris</i>	1

Protected Species

Species Type	Latin Name	Number of new occurrences
Badger	Meles meles	3
Barn Owl	Tyto alba	3
Chiroptera	Chiroptera	1
Common Buzzard	Buteo buteo	60
Common Pipistrelle	Pipistrellus pipistrellus	1
Common Redstart	Phoenicurus phoenicurus	6
Eurasian Badger	Meles meles	5
Eurasian Hobby	Falco subbuteo	14
Peregrine Falcon	Falco peregrinus	17
Pipistrellus	Pipistrellus	1
Red Kite	Milvus milvus	3
Sand Martin	Riparia riparia	10

List of species important to biological diversity in England (as identified in Section 74 of the Countryside and Rights of Way Act 2000)

Species Type	Latin Name	Number of new occurrences
Common Bullfinch	Pyrrhula pyrrhula	12
Common Linnet	Carduelis cannabina	4
Common Pipistrelle	Pipistrellus pipistrellus	1
Corn Bunting	Miliaria calandra	1
Eurasian Tree Sparrow	Passer montanus	16
European Turtle Dove	Streptopelia turtur	1
European Water Vole	Arvicola terrestris	1
Freshwater Crayfish	Austropotamobius pallipes	1
Grey Partridge	Perdix perdix	16
Reed Bunting	Emberiza schoeniclus	7
Sky Lark	Alauda arvensis	14
Song Thrush	Turdus philomelos	2
Spotted Flycatcher	Muscicapa striata	3
Water Vole	Arvicola terrestris	1

Key Species

Species Type	Latin Name	Number of new occurrences
Barn Owl	Tyto alba	3
Barn Swallow	Hirundo rustica	11
Blackcap	Sylvia atricapilla	14
Bullhead	Cottus gobio	1
Chiffchaff	Phylloscopus collybita	1
Common Blackbird	Turdus merula	16
Common Bullfinch	Pyrrhula pyrrhula	12
Common Buzzard	Buteo buteo	60
Common Chiffchaff	Phylloscopus collybita	8
Common Grasshopper Warbler	Locustella naevia	1
Common Kestrel	Falco tinnunculus	52
Common Kingfisher	Alcedo atthis	14
Common Linnet	Carduelis cannabina	4
Common Redstart	Phoenicurus phoenicurus	6
Common Shelduck	Tadorna tadorna	2
Common Snipe	Gallinago gallinago	10
Common Starling	Sturnus vulgaris	2

Coot	Fulica atra	1
Corn Bunting	Miliaria calandra	1
Eurasian Curlew	Numenius arquata	1
Eurasian Hobby	Falco subbuteo	14
Eurasian Tree Sparrow	Passer montanus	16
European Goldfinch	Carduelis carduelis	5
European Turtle Dove	Streptopelia turtur	1
Freshwater Crayfish	Austropotamobius pallipes	1
Green Sandpiper	Tringa ochropus	1
Green Woodpecker	Picus viridis	17
Grey Partridge	Perdix perdix	16
Hedge Accentor	Prunella modularis	17
Jack Snipe	Lymnocyptes minimus	1
Kingfisher	Alcedo atthis	1
Little Grebe	Tachybaptus ruficollis	7
Little Plover	Charadrius dubius	26
Mute Swan	Cygnus olor	1
Northern Lapwing	Vanellus vanellus	10
Northern Wheatear	Oenanthe oenanthe	24
Peregrine Falcon	Falco peregrinus	17
Redwing	Turdus iliacus	4
Reed Bunting	Emberiza schoeniclus	7
Ringed Plover	Charadrius hiaticula	8
Sand Martin	Riparia riparia	10
Sky Lark	Alauda arvensis	14
Song Thrush	Turdus philomelos	2
Spotted Flycatcher	Muscicapa striata	3
Stock Pigeon	Columba oenas	2
Stonechat	Saxicola torquata	1
Tufted Duck	Aythya fuligula	3
Water Rail	Rallus aquaticus	1
Willow Tit	Parus montanus	3
Wood Warbler	Phylloscopus sibilatrix	3

Change in areas designated for their intrinsic environmental value including sites of international, national, regional, sub-regional or local significance.

Site Ref.	Site Name	LBAP habitat	Object	sub site	site totals	
56374	Clinker Line	Calcareous grassland	Woodland & scrub north	1.62 ha	2.28	ha
		Spring and flush	Spring & flush	0.09 ha		ha
		Mixed woodland	Woodland & scrub south	0.57 ha		ha
56422	The Borrow Pit	Neutral grassland	north & east bank	2.93 ha	3.44	ha
		Neutral grassland	south & west banks	0.51 ha		ha
56423	The Goat Field	Neutral grassland			1.13	ha
58180	Croft Roadside Verge	Neutral grassland			0.03	ha
56424	Long Meadow	Neutral grassland			1.33	ha
56688	New Haven Farm Paddock	Improved grassland			0.88	ha
57879	River Soar Sopers Bridge	River			700m	m

	north				
57911	Grand Union Canal	Canal	Little Glen Bridge to Parish Border	607.8m	m
		Canal	Rail Bridge to Little Glen Bridge	502.2m	m
60011	The County Hall Oak	Ancient Tree		4.76 girth	m
57877	Sopers Bridge Ash 1	Ancient tree		3.6 girth	m
57878	Sopers Bridge Ash 2	Ancient tree		4.0 girth	m

Renewable Energy

Table 7: Core Indicator

Indicator description	Target	2007/08 achieved	Comments	Local Policy	Plan
Renewable energy capacity installed by type	A year on year increase in renewable energy capacity installed.	0		CF3 [#] / CF4 [#]	

[#] = as of 27th September 2007 this policy is no longer part of the Blaby District Local Plan. These policies are however, covered in National and Regional policy documents.

Gypsy and Travellers

Table 8: Core Indicator.

Indicator description	Target	2007/08 achieved	Comments	Local Policy	Plan
Net additional Permanent Pitches	26 pitches by 2016	17		R7 [#]	
Net additional Transit Pitches	10 pitches by 2016	0		R7 [#]	

[#] = as of 27th September 2007 this policy is no longer part of the Blaby District Local Plan. This policy is however, covered in National and Regional policy documents

7. Glossary

When reading this document you may encounter expressions which you are not familiar with as the Planning and Compulsory Act 2004 introduced new terminology to planning policy. This section defines and explains these new terms.

Annual Monitoring Report (AMR)

A report that reviews the actual plan process compared to the targets and milestones for local development document preparation set out in the Local Development Scheme. The AMR will also review the impact of policies contained in the Local Development Framework.

B1 (a) employment use

Offices.

B1 (b) employment use

Research and development, studios, laboratories, high tech.

B1 (c) employment use

Light industry.

B2 employment use

General industry.

B8 employment use

Wholesale warehouse, distribution centres, repositories.

Core Strategy

The Core Strategy sets out the vision, spatial strategy and objectives for the District. All other Local Development Documents should be in general conformity with the Core Strategy.

Department of Communities and Local Government (DCLG).

Development Plan Document (DPD)

A Local Development Document that carries Development Plan status and is subject to procedures of community involvement, consultation and independent examination. This document will contain policies against which planning applications will be considered.

Government Office for the East Midlands (GOEM)

The Government Office for the East Midlands (GOEM) represents central government in the East Midlands Region. GOEM works to develop government programmes and initiatives at a regional and local level, by working in partnership with relevant organisations to meet local needs.

Leicestershire, Leicester and Rutland Structure Plan (LLRSP)

The LLRSP (2005) is part of the development plan for Blaby District. It covers the period 1996 to 2016 and establishes the strategic housing and employment requirement for the District of Blaby in this period.

Local Development Document (LDD)

A document which, along with others of its kind, sets out the development plan policies and supporting guidance that is in force in the area. There are three types of Local Development Documents: Development Plan Documents, Supplementary Planning Documents and the Statement of Community Involvement.

Local Development Framework (LDF)

The Local Development Framework sets out, in the form of a 'portfolio', the Local Development Documents which collectively deliver the spatial planning strategy for the area.

Local Development Scheme (LDS)

The Local Development Scheme is a document which sets out the local planning authority's programme for the production of Local Development Documents.

Office of the Deputy Prime Minister (ODPM)**Planning Policy Statement (PPS)**

Government statements of national planning policy which will guide the content of the Local Development Framework. Planning Policy Statements are replacing Planning Policy Guidance Notes (PPGs).

Previously Developed Land (PDL)

Land which or was occupied by a permanent structure (not related to agriculture or forestry use). Also known as brownfield land.

Proposals Map

This will illustrate, on an Ordnance Survey Base Map, all the policies and proposals contained in the Development Plan Documents and Saved Policies.

Statement of Community Involvement (SCI)

A statement enabling communities to know when they will be involved in the preparation of Local Development Documents. It will outline how the local planning authority plan to engage communities in the preparation of Local Development Documents. The document will also cover community involvement in the determination of planning applications.

Strategic Environmental Assessment (SEA)

Assessment of the environmental impacts of the policies and proposals contained within the Local Development Framework. An SEA is required only when a plan is likely to have a significant environmental effect.

Supplementary Planning Document (SPD)

A Local Development Document that does not carry Development Plan status but is required to be included in the Local Development Framework as it elaborates on the policies and proposals in Development Plan Documents.

Sustainability Appraisal (SA)

An SA must be carried out prior to **all** plans being adopted. It involves an assessment of the social, economic and environmental implications of the plans and policies in the LDF to ensure that all decisions are made with the objective of sustainable development in mind. The SA incorporates the requirements of the Strategic Environmental Assessment.

Windfall sites

Sites developed for housing that are not allocated for this purpose in the Blaby District Local Plan (1999).

This information can be made available on request, in other languages and formats (large print, Braille, or on audio tape) by contacting:-

Planning and Environmental Health Services

Blaby District Council

Council Offices

Desford Road

Narborough

Leicester

LE19 2EP

Tel: 0116 2727693/7765/7775

Fax: 0116 2727592

Minicom: 0116 2849786

Email: planning@blaby.gov.uk

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Appendix A: Local Development Scheme Programme Timetable (May 2007)

Document Title	2007				2008				2009				2010				2011				2012		
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Revised Local Development Scheme	J	F	M																				
Preparation																							
Submission to S of S																							
Core Strategy DPD																							
Commencement of document preparation																							
Public participation on preferred options document and formal SA report																							
Submission to S of S and SA report																							
Pre-examination meeting																							
Commencement of the examination																							
Adoption and publication of document																							
Allocations and Designations DPD																							
Commencement of document preparation																							
Public participation on preferred options document and formal SA report																							
Submission to S of S and SA report																							
Pre-examination meeting																							
Commencement of the examination																							
Adoption and publication of document																							
Affordable Housing SPD																							
Commencement of document preparation																							
Draft SPD and SA report issued for public participation. Copies sent to S of S.																							
Adoption and publication of document																							
Sustainable Urban Extension & Strategic Employment Site SPD																							
Commencement of document preparation																							
Draft SPD and SA report issued for public participation. Copies sent to S of S.																							
Adoption and publication of document																							

The Proposals Map and Inset Plans DPD will be amended when other DPDs that allocate sites or identify site- specific allocations are adopted.

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Appendix B - Detailed Programme Timetable

Document Title	2007			2008				2009				2010				2011				2012								
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3						
Revised Local Development Scheme	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O
Preparation																												
Submission to S of S																												
Core Strategy DPD																												
Commencement of document preparation																												
Public participation on Options document and formal SA report																												
Consultation on submitted Core Strategy																												
Submission to S of S and SA report																												
Pre-examination meeting																												
Commencement of the examination																												
Adoption and publication of document																												
Allocations and Designations DPD																												
Commencement of document preparation																												
Public participation on Options document and formal SA report																												
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Submission to S of S and SA report																												
Pre-examination meeting																												
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Adoption and publication of document																												
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Commencement of document preparation																												
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Adoption and publication of document																												
Sustainable Urban Extension & Strategic Employment Site SPD																												
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Draft SPD and SA report issued for public participation. Copies sent to S of S.																												
Adoption and publication of document																												

The Proposals Map and Inset Plans DPD will be amended when other DPDs that allocate sites or identify site- specific allocations are adopted.

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**DIRECTION UNDER PARAGRAPH 1(3) OF SCHEDULE 8 TO THE
PLANNING AND COMPULSORY PURCHASE ACT 2004
POLICIES CONTAINED IN THE BLABY DISTRICT LOCAL PLAN
ADOPTED IN SEPTEMBER 1999**

The Secretary of State for Communities and Local Government in exercise of the power conferred by paragraph 1(3) of Schedule 8 to the Planning and Compulsory Purchase Act 2004 directs that for the purposes of the policies specified in the Schedule to this direction, paragraph 1(2)(a) of Schedule 8 to the Planning and Compulsory Purchase Act 2004 does not apply.

Signed by authority of the
Secretary of State

Lesley Flint

Lesley Flint
Head of Housing, Planning and Urban Policy
Government Office for the East Midlands
21st September 2007

SCHEDULE

POLICIES CONTAINED IN THE BLABY DISTRICT LOCAL PLAN ADOPTED SEPTEMBER 1999

- R1 Residential Development within Primarily Residential Areas
- R2 Non Residential Development in Primarily Residential Areas
- R3 Other housing development within the Limits to the Built Up Areas
- R4 Affordable Housing on sites not specifically proposed for development
- R5 Affordable Housing in Rural Area (Exceptions Sites)
- R11 Cosby Cottages Estate
- R12 Cosby Cottages Estate
- R13 Playspace for Children
- R14 Open Space for Formal Recreation
- R15 New Residential Development
- E1 Employment Development within Primarily Employment Area
- E2 Primarily Business Areas and Other Locations for Business within the Built Up Area
- E4 Protection of Employment Land and Buildings
- E5 Calor Site, Potters Marston
- E6 High Pressure Gas Pipeline
- E7 Employment Development Proposals
- E8 Business Development Proposal - Highfields Enterprise Centre, Stoney Stanton
- E9 Business and General Industrial Development Proposal - Kirby Park Farm, Kirby Muxloe
- E10 High Quality Employment Site Proposal - Grove Farm, Enderby
- T1 Public Transport Provision to serve Major New Development
- T2 Off Road / Lay-by Provision for Public Transport
- T3 New Highway Schemes: Provision of Pedestrian and Cyclist Facilities and Environmental Safeguards
- T4 Traffic Impact Assessments
- T5 Road Related Service Facilities
- T6 Off Street Parking Provision
- T7 Loss of Off Street Parking or Garaging Space
- T8 Off Road Facilities for Loading, Unloading and Servicing
- T10 Car Parking and Servicing Areas Design
- T11 Road Improvement Lines
- T12 Access and Mobility Needs; Open Spaces
- T13 Land Safeguarded for the Provision of New Railway Stations
- T14 Narborough Station Car Park Extension
- T15 High Load / Abnormal Load Route
- T16 Airport Flight Path

- T17 Road Schemes and Improvements
- S2 Small Scale Retail Developments
- S3 Loss of Local Shopping Facilities
- S4 Financial, Professional and Other Services
- S5 Food and Drink Uses
- S6 Opening Hours of Hot Food Shops
- S7 Farm Shops
- S9 Blaby Central Area
- S10 Blaby Central Area - Primary Shopping Frontages
- S11 Blaby Central Area - Secondary Shopping Frontages
- S12 Motorways Retail Area
- S13 Local Shopping Centres
- S14 Village Centres and Neighbourhood Centres
- S15 Development Within Local Shopping Centres
- C1 Agricultural Buildings in the Countryside
- C2 Other Development in the Countryside
- C3 Green Wedges
- C4 Separation of Settlements
- C5 The Change of Use and Adaptation of Existing Buildings in the Countryside, Green Wedges and Areas of Separation
- C6 Extension of Existing Buildings in the Countryside, Green Wedges and Areas of Separation
Replacement of Existing Dwellings in the Countryside, Green Wedges and Areas of Separation
- C7 Open Areas of Importance to the Form and Character of the Built Environment
- C10 Elmesthorpe Land Settlement Association Area
- C11 Location of Sport and Recreation Development
- L1 Protection of Recreation Land and Buildings
- L2 Recreation Proposal; Cork Lane, Glen Parva
- L4 Recreation Proposal; Carey Hill Road, Stoney Stanton
- L5 Other Public Open Space Proposals
- L6 Recreation Routes
- L7 Grand Union Canal
- L8 Disused Quarries
- L9 Tourism Development
- L10 Scheduled Ancient Monuments and Archaeological Sites
- CE1 Listed Buildings; Demolition
- CE3 Listed Buildings; Change of Use
- CE4 Listed Buildings; Setting
- CE6 Listed Buildings; Signs and Advertisements
- CE7 Conservation Areas; Demolition of Unlisted Buildings
- CE8 Conservation Areas; Vistas/Street Scenes/Open Spaces
- CE9 Conservation Areas; Character or Appearance
- CE10 Conservation Areas; New Buildings and Extensions to Existing
- CE11

Buildings

- CE12 Conservation Areas; Traffic Levels
- CE13 Conservation Areas; Advertisements
- CE14 Conservation Areas; Advertisements
- CE15 Kirby Fields Conservation Area
- CE16 Cosby Conservation Area; Shopfront Replacement
- CE17 Cosby Conservation Area; Shopfront Replacement or Alteration
- CE19 Other Nature Conservation Site Protection
- CE21 Existing Trees and Woodlands
- CE22 Landscaping
- CE23 Croft Hill Area of Local Landscape Value
- CE24 Fosse Meadows Nature Park
- CE25 Crime Prevention
- CE26 Light Pollution
- M2 Unstable Land
- M3 Contaminated Land
- M4 Mineral Reserves
- CF5 Floodplain Protection
- CF7 Sewage Treatment Works - Cordon Sanitaire
- CF9 Blaby Hospital
- IM1 Planning Obligations

BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Hinckley and Bosworth Borough Council Core Strategy Proposed Submission Document
Report of:	Corporate Head of Policy and Partnerships
Status:	Public

1. Purpose of Report

- 1.1. To advise the Cabinet Executive of the key policies contained within the Hinckley and Bosworth Core Strategy submission document that will impact on the District of Blaby and to seek agreement that the proposed recommendations be submitted as the formal representations of Blaby District Council. The current consultation stage on this document is the final opportunity for this Council to make representations on the Hinckley and Bosworth Core Strategy before it is submitted to the Secretary of State and consequently the final version be adopted. The closing date for receipt of comments is **12 December 2008**.

2.	<u>Recommendation</u>
2.1	That the Cabinet Executive agrees that the recommendations shown in bold italic type within this report be submitted to Hinckley and Bosworth Borough Council as the formal representations of Blaby District Council concerning the Hinckley and Bosworth Borough Council Core Strategy submission document.
3.	<u>Reason for Decision Recommended</u>
3.1	The Borough of Hinckley and Bosworth directly adjoins the District of Blaby, resulting in a number of policies set out within the Hinckley and Bosworth Core Strategy potentially impacting upon the District of Blaby. The Hinckley and Bosworth Core Strategy, once submitted to the Secretary of State, and consequently adopted, will be legally binding.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 11/08(057).

5. Key Decision

- 5.1 Yes.

6. **Matters for Consideration**

6.1. This report highlights those policies contained within the Hinckley and Bosworth Borough Council Core Strategy document that will impact on the District of Blaby. The entire document is available within the Policy and Partnerships Division and on www.hinckley-bosworth.gov.uk .

6.2. Policy 2: Development in Earl Shilton
Allocation of land for the development of a mixed use Sustainable Urban Extension to the south of Earl Shilton, including 2000 new homes, 10ha of employment, neighbourhood shops, new primary school and children's centre, GP's, neighbourhood policing and green space provision.

6.3 ***Recommendation:***

That Blaby District Council, whilst not objecting to this policy, does wish to ensure that there are minimal adverse impacts on the transport network within the District of Blaby, and there are minimal detrimental environmental impacts resulting from this large scale development. Further evidence is required.

6.4. Policy 3: Development in Barwell
Allocation of land for development of a mixed use Sustainable Urban Extension to the west of Barwell, including 2500 environmentally sustainable homes, 15ha of employment, neighbourhood shops, a new primary school and children's centre, GP's, neighbourhood policing and green space provision.

6.5. ***Recommendation:***

That Blaby District Council, whilst not objecting to this policy, does wish to ensure that there are minimal adverse impacts on the transport network within the District of Blaby, and there are minimal detrimental environmental impacts resulting from this large scale development. Further evidence is required.

6.6. Policy 5: Transport Infrastructure
Support the reopening of the Elmesthorpe passenger railway station to serve Earl Shilton and Barwell residents.
Investigate the potential of providing a link between the Earl Shilton bypass and M69 through the development of the Earl Shilton and Barwell Sustainable Urban Extension Area Action Plan.

6.7. ***Recommendation:***

That Blaby District Council supports the objective of improving the transport network for all users, and whilst the reopening of the passenger railway station at Elmesthorpe could improve the coverage of the transport network, evidence needs to be provided to show the deliverability of this scheme, as well as the adverse impacts that a scheme like this could generate being kept to a minimum. There would also need to be evidence that this scheme would not decrease the deliverability of the reopening of a passenger train station at Blaby. Blaby District Council requires evidence of the deliverability of providing a link between the Earl Shilton bypass and M69, as well as evidence that this scheme would not generate significant adverse effects on the District. Evidence of the implications for the road network

also needs to be made available.

- 6.8. Policy 8: Key Rural Centres Relating to Leicester
Desford: Safeguard land for the development of a new passenger railway station and associated car parking on the site of the former station yard at Desford in case the National Forest line is re-opened to passenger facilities.
Ratby: Deliver safe cycle routes as detailed in Policy 14, in particular from Ratby to Groby Community College, into Glenfield and Kirby Muxloe and to Timkens employment site.
- 6.9. ***Recommendation:***
Blaby District Council supports the potential future re-opening of the National Forest line to passengers, and the delivery of safe cycle routes into Glenfield and Kirby Muxloe.
- 6.10. Policy 10: Key Rural Centres within the National Forest
Safeguard land at Bagworth for the development of a new passenger railway station and associated car parking in case the National Forest line is re-opened to passenger facilities.
- 6.11. ***Recommendation:***
Blaby District Council supports the potential future re-opening of the National Forest line to passengers.
- 6.12. Policy 14: Rural Areas: Transport
Support the safeguarding of the route of the National Forest line and stations at Desford and Bagworth, against the possibility that in the longer term a cost effective passenger service reinstatement on that line may be achievable.
- 6.13. ***Recommendation:***
Blaby District Council supports the potential future re-opening of the National Forest line to passengers.
- 6.14. Policy 20: Green Infrastructure
Ratby to Desford Multifunctional Corridor – create a recreational corridor along Rothley Brook between Ratby and Desford where the stream corridor provides a landscape-scale connecting feature between the two settlements. This link could then be extended to the neighbouring settlements of Kirby Muxloe and Leicester Forest East.
- 6.15. ***Recommendation:***
Blaby District Council supports the development of a recreational corridor and the potential extension of this into Kirby Muxloe and Leicester Forest East.

7. Other Relevant Considerations

7.1 Nottingham Declaration and Climate Change

The Hinckley and Bosworth Borough Council Core Strategy contains a significant amount of development in the form of the Sustainable Urban Extensions and possible developments on the transport network. Subsequently, there is a clear need for Hinckley and Bosworth Borough Council to assess these developments with regard to the impacts they may

have on climate change, and to encourage energy efficient development.

8. Other Options Considered

- 8.1 An alternative option is not to respond, but this has been rejected because Hinckley and Bosworth Borough adjoins the District of Blaby, and certain proposed developments within Hinckley and Bosworth Borough are highly likely to impact within the District of Blaby.

9. Appropriate Consultations

- 9.1 None.

10. Financial and Efficiency Implications

- 10.1 No financial implications have been identified.

11. Appendices to this report

- 11.1 None.

12. List of Background Papers

- 12.1 Hinckley and Bosworth Borough Council Core Strategy Proposed Submission Document (October 2008).

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- Monitoring Officer** (Legal Services Manager)
- Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Strategy for Ageing Well in Leicestershire 2008-2011
Report of:	Corporate Head of Policy & Partnerships
Status:	Public

1. Purpose of Report

- 1.1 To inform the Cabinet Executive of the “Strategy for Ageing Well in Leicestershire 2008-2011” and to seek formal endorsement.

2.	<u>Recommendation</u>
2.1	To endorse the “Strategy for Ageing Well in Leicestershire 2008-2011” and Blaby District Council’s contribution.
3.	<u>Reason for Decision Recommended</u>
3.1	Blaby District Council is committed through the Sustainable Community Strategy for the District to meet the needs, aspirations and priorities of the communities living in the District, irrespective of age, ethnicity, physical ability etc. The “Strategy for Ageing Well in Leicestershire 2008-2011” seeks to address, in partnership with key agencies issues associated with the older population at County level which encompasses those resident in Blaby District.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 10/08(049).

5. Key Decision

- 5.1 Yes.

6. Matters for Consideration

- 6.1 The “Strategy for Ageing Well in Leicestershire 2008-2011” (provided as Appendix 2) has been produced by Leicestershire County Council in partnership with the District/Borough Councils’ in Leicestershire and other agencies, including development through the Older Person’s Engagement Network (OPEN) and the County Integrated Partnership for Older people (CIPOP). It outlines high level objectives that are expected to be delivered for the County’s ageing population, to ensure that older people are not excluded from participating fully in the community in which they live.

- 6.2 In Blaby District representation for the Voice of Older People comes through the Older Person's Champion, Cllr Jill Blackwell, who has established the Blaby District Older Person's Forum, in partnership with Voluntary Action Blaby District. In addition to Cllr Blackwell's role, the District also benefits from the work of Lucy Smith who Chair's the District's Older Person's Forum and is a key link to OPEN.
- 6.3 Research used to inform the strategy indicates that when asked, older people have strong views about the factors that make a difference to their lives and keep them independent. Adequate services and access to good information are seen as essential as well as being able to have choice and control over their own lives and being able to help others. These are factors seen as central to having an enjoyable life.
- 6.4 "Ageing Well in Leicestershire" states that a shift is needed in the way that we think about older people, often seeing people as dependent and frail rather than as citizen's with a contribution to make. The strategy also states that account needs to be taken of the whole range of issues that are important to older people to ensure better outcomes which help older people to feel more valued and in control of their lives. There are a number of areas where the older people's network in Leicestershire has said they would like to see this happen:-

- Communities
- Income and Wealth
- Keeping active and busy
- Health
- Social Care
- Housing and the Home

These themes are the basis for the chapters in "Ageing Well in Leicestershire". 6.5 to 6.10 of this report provide an overview of the document with appendix 1 providing the actions to address priority issues raised.

6.5 Communities

- 6.5.1 The term "community" is used to capture the many aspects that make older people feel involved, informed and a true part of the community in which they live. The local government White Paper, "Strong and Prosperous Communities (2006)", seeks to give communities and service users a greater say in how local services are delivered. The Countywide Older People's Engagement Network (OPEN) has been established to develop a stronger voice for older residents as has the Blaby District Older Person's Forum.
- 6.5.2 A key issue for older people is access to services, many rely on public transport and those without access to a car will be those generally who are poorer and have worse health, and so may have more specific requirements from a transport service that is accessible, flexible and affordable. In Leicestershire over 62% of people aged 60 or over have a bus pass (higher than the national average of 56%). The take up in Blaby District is above 70%.

6.6 Income and Wealth

- 6.6.1 Just over 70% of the total caseload of pensioners in Leicestershire (Blaby District 73%) are entitled to only state pension and do not have a disability. Another 10 per cent (Blaby District also 10%) have no disability but are receiving a means tested

top-up where income is low through a pension credit. Approximately a fifth of pensioners are disabled (the same for Blaby District), with ten per cent just receiving the state pension, and a further eight per cent (7% in Blaby District) receiving an income top-up.

6.6.2 Recent research by help the Aged showed that while the poorest older people live throughout England and Wales, very high proportions are living in the most disadvantaged wards on income-related benefits, creating areas of acute disadvantage.

6.6.3 Income is only one component of wealth. Managing finances and avoiding debt can be a difficult issue for some people. An “advice gap” has been identified with older people needing better access to financial advice to manage retirement, and the various products available to them.

6.7 Keeping Active and Busy (including active learning, volunteering, employment)

6.7.1 There can be great benefit for older people to be active leading to personal fulfilment. Ways that people achieve this include education, volunteering and working. Research has shown older people gain real health benefits from learning. Learning opportunities come in many forms, aside from formal education. People aged 50+ are significant users of Library Services, with them taking part in computer courses, taster sessions, local history sessions, reading and story telling groups.

6.7.2 People who are unable to work because of a limiting illness are eligible to claim Incapacity benefit (IB). IB is a major national issue and the government is making major policy interventions to reduce the numbers claiming IB and encourage them back into work. A major proportion of IB claimants in Leicestershire are over 50 years of age. Of all claimants in Blaby District (2225 people), 39.3% are in the age bracket 50-59 and 15.9% are 60 or over. That compares to of all claimants in Leicestershire (16,490) 37.7%, 50-59 years old and 15.5% aged 60 or over.

6.7.3 The role of volunteers is crucial across communities as is the opportunity to work as people get older. Research has shown that early withdrawal from the labour market can increase poverty and have a negative effect on health, including depression and worsening mental health, related to the increase in social exclusion and isolation.

6.8 Health

6.8.1 In Leicestershire the cause of death varies with age, with cancer a more important cause for the under 65's and circulatory diseases a more important cause for the over 65's. A key national issue is tackling health inequality, reinforced by the publication of a government strategy: Tackling Health Inequalities: A programme for action. 1600 older people from Leicestershire and Rutland die in acute hospital wards in University Hospitals Leicester each year plus another 70 in A & E (excluding unexpected deaths and those following surgery). The Decisions At Life's End (DALE) project aims to reverse this trend and give as many people as possible the choice to die at home.

6.8.2 For 2001-2003 in Leicestershire's Districts, life expectancy is generally higher for females and both male and female figures are higher than the regional figure.

Blaby is the only District that has the highest life expectancy for both males (78.9 years) and females (82.8 years) and Melton has the biggest difference between the sexes - 4.3 years.

6.8.3 Older people can benefit very significantly from undertaking the recommended levels of physical activity. It promotes mental and physical health, helps maintain a healthy weight, and reduces the risk of serious diseases including heart disease and stroke. Walking for health schemes and other initiatives are attempting to help increase levels of physical activity in the older person.

6.9 Social Care and Carers

6.9.1 The key priority remains for social care to support outcomes for older people in line with the White Paper "Our Health, Our Care, Our Say" and to arrange services which encourage and support people to live independently in their own homes with local community support. In Leicestershire over 10,000 older people each year receive social care support from the County Council. The level of home care provided to older people has increased year on year since 2000, and there has been a proportionate decrease in the numbers of people entering care homes.

6.9.2 With a growing older population who are living longer there will be an increasing need to ensure social care is focussed on those with greatest need but also supports all vulnerable older people to live as independently and as safely as possible. The County Council is the lead agency for adult protection and has a duty to investigate all allegations of abuse (Elder Abuse).

6.10 Housing and Home

6.10.1 In 2001, 89% of those aged 55-64 owned their own property in Leicestershire. In Blaby District this equates to 92.5%. These figures decrease with age so that at 85 and over 66% own their own property in Leicestershire, this figure is comparable at 66.55% in Blaby District.

6.10.2 Social Housing stock across the County is due to meet the decent homes standard by 2010. Private sector stock will meet the standard through the Housing Health and Safety Rating System (HHSRS) setting minimum standards. Home Improvement Agencies may play an important role in helping to achieve decent homes in the private sector.

6.11 Considering, Addressing and Monitoring the Issues

6.11.1 Having considered each section of the "Strategy for Ageing Well in Leicestershire" in overview, Appendix 1 of this report provides a summary of priority issues, the delivery mechanism seeking to address these and the lead agency or agencies associated with them to take them forward. In some areas district councils' are identified under the lead agency column.

6.11.2 It is proposed that the issues that relate to Blaby District Council/District Councils' are accommodated as part of service planning arrangements, corporately across the authority and through participation in the Leicestershire Chief Housing Officer Group (CHOG). Reporting arrangements are also to be captured as part of the Council's Performance Management systems, and priorities within the "Strategy for Ageing Well in Leicestershire" will also help inform discussions on Cabinet Portfolio priorities where appropriate.

7. Other Relevant Considerations

7.1 Human Rights Act 1998

There are no particular human rights issues other than those contained within the report.

7.2 Legal Implications

No other comments other than those made within the report.

7.3 Equalities

Completion of an Equality Impact Needs Assessment (EINA) is a matter for Leicestershire County Council. In overview the “Strategy for Ageing Well in Leicestershire” is in conformity with equality of opportunity and aims to address issues around inequality for the older population where they might exist.

7.4 Nottingham Declaration and Climate Change

No particular comments.

7.5 Crime & Disorder

The “Strategy for Ageing Well in Leicestershire” recognises the community safety issues faced by the older population and seeks to support mechanisms to reduce the vulnerability of the older person. There are no additional crime and disorder issues brought forward as a consequence of the strategy.

7.6 Human Resources Implications

For Blaby District Council, compliance with the strategy will be from within the existing human resources available.

7.7 Risk Assessment

Risks associated with the strategy relate to Blaby District Council not addressing the needs of the older population appropriately. Compliance provides a mechanism to help minimise these risks in partnership with Leicestershire County Council and other agencies.

8. Other Options Considered

8.1 The issues discussed in the strategy provide a requirement for partnership working. There are no other key options other than the approach taken.

9. Appropriate Consultations

9.1 The “Strategy for Ageing Well in Leicestershire” has been developed with the Older Person’s Engagement Network (OPEN) and the County Integrated Partnership for Older people (CIPOP). Engagement on delivery will also include future engagement through the District’s Older Persons Forum.

10. Financial and Efficiency Implications

- 10.1 There are no additional financial implications other than those captured through the normal budget planning processes/allocations. Should there be a subsequent need for additional resources this will be raised, as appropriate, through a report being made to the Cabinet Executive.

11. Appendices to this report

- 11.1 "Summary of the Priority Issues – "A Strategy for Ageing Well in Leicestershire 2008-2011".
- 11.2 "Strategy for Ageing Well in Leicestershire 2008-2011"

12. List of Background Papers

- 12.1 "Ageing Well in Leicestershire – A statistical Profile of Leicestershire's Older People".

The following Officers/Members have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder (Cabinet Executive/Council reports only)

Appendix 1: A Strategy for Ageing Well in Leicestershire

Summary of the Priority Issues

This list of priority issues is lifted from the draft of the Ageing Well in Leicestershire Strategy. These key issues arose from the Local Area Agreement for Older People consultation event in September 2007. Some of the points overlap or cut across different service areas.

Priority Issue	Delivery Mechanism	Lead Agency
COMMUNITIES		
Aim: Older people feel part of their neighbourhood		
Older people need to feel safe and secure within their communities: <ul style="list-style-type: none"> - increase numbers of cold calling zones - reduce bogus callers - continue with initiatives via Community safety group to reduce fear of crime and increase security advice - increase numbers of fire alarms for older people 	Home Safety Group / County Integrated Partnerships for Older People (CIPOP) Community safety Plan	Leicestershire County Council (LCC) Trading standards Fire services
Older people take part in their communities and using local facilities: <ul style="list-style-type: none"> - Give people appropriate advice about befriending schemes - Increase numbers of volunteers to support dependent people - Develop older people's champions via OPEN to disseminate information in local areas - Support and advice to people to develop a 'life change plan' around key stages as they age e.g. retirement, bereavement - Libraries to identify people over 60 who stop using services to check their well-being - Increase Intergenerational activities via schools, youth clubs 	CIPOP Local Area Agreement (LAA) LCC Corporate group	Community Voluntary Service (CVS) /VOL Agencies CVS Blaby Older People's Engagement Network (OPEN)/ CVS Community Partnership (CCP) All LCC LCC

Priority Issue	Delivery Mechanism	Lead Agency
Transport services need to be able to meet the needs of older people in each locality <ul style="list-style-type: none"> - Transport plan to take account of needs of older people - Directory of community transport and voluntary sector providers - Undertake survey of use of transport by older people, their experience and usage - Promote safety on roads for older people 	LCC Transport Plan	LCC
Older people need relevant, timely, cross-agency advice and information at 'first contact' with any of the key services: <ul style="list-style-type: none"> - Key partners to pilot 'first contact' signposting in Blaby via First Lottery and NW Leics via agency funding 	LAA Strategic Board for benefits take-up	CIPOP
Older people have a strong voice and are actively engaged in decision-making through the Older People's Network and Older People's Champion Network: <ul style="list-style-type: none"> - Increase numbers of Older people in network and links to local older people's groups - Increase numbers of older people in planning groups - Recruit and train Older People's champions in each locality, agency and service providers - Roll out Dignity in Care Charter with care services providers 	OPEN	CIPOP
INCOME AND WEALTH		
Aim: Older people to be supported to maximise income and use money more effectively		
To aim for increased numbers of people over age 50 in employment: <ul style="list-style-type: none"> - include in economic block of Community Strategy 	Economic block of LAA	East Midlands Development Agency (EMDA)
Increase the take-up of income benefits amongst older people: <ul style="list-style-type: none"> - identify and breakdown barriers to taking up entitlements needs to include advice and improved communication across agencies 	LAA	LCC Adult Social Care Service (ASCS)
Provision of advice and early identification of people with financial problems (poverty, debt)		

Priority Issue	Delivery Mechanism	Lead Agency
via multi-agency collaboration: <ul style="list-style-type: none"> • Include pre-retirement and good financial advice • Provide advice to avoid fuel poverty 		Citizen Advice Bureaus (CABs), Money advice, vol sector
KEEPING ACTIVE AND BUSY		
Aim: Older people need to be able to access a full range of facilities in their local communities		
Provide a co-ordinated approach to volunteering for people aged over 50 who are not in employment: <ul style="list-style-type: none"> - Increase numbers of older volunteers across agencies - Increase numbers of older people who have access to a volunteer/be-friender for cultural and other activities - Link with LSE to develop training for volunteers - 	LAA	CVS/Vol Centres
Ensure a full range of meaningful cultural and learning opportunities for people as they age. <ul style="list-style-type: none"> - Transform adult social care approach to day services so more frail older people using direct payments to remain active in their local area - Develop a joined approach with adult education to provide more learning opportunities 	LAA OPEN	LCC ASCS LCC/Learning and Skills Council (LSC)
HEALTH		
Aim: To support more older people to live healthier lives with care closer to home		
Reduce number of emergency hospital admissions, and avoid re-admissions, for people aged over 65: <ul style="list-style-type: none"> - DALE end of life service - Develop services around care homes to reduce admissions - Pilot community-based rather than hospital based old age consultants to support care homes - Develop dementia strategy to support more people at home 	PCT POPP (Partnerships for Older People Projects) PCT PCT PCT/LCC	PCT/LCC CIPOP

Priority Issue	Delivery Mechanism	Lead Agency
Develop community based rehabilitation service pathways to meet the needs of people that have had strokes and falls. <ul style="list-style-type: none"> - develop stroke pathway across Health and social care - develop support to carers - establish new falls service and bone health strategy group - evaluate use of assistive technology to prevent falls 	PCT PCT PCT LCC – ASCS UHL (University Hospitals of Leicester)	PCT CIPOP
Have in place a clear, publicised strategy for meeting the health needs of older people across Leicestershire. <ul style="list-style-type: none"> - undertake joint strategic needs assessment for Leicestershire - identify shared priorities for joint commissioning 	LCC PCT	
Social Care and Carers and Housing Aim: Supporting independence of older people and carers		
Develop a Leicestershire-wide ‘Dignity in Care Charter’, putting older people at the centre of services.		UHL, LCC, LPT, PCT
Support increasing numbers of older people to live at home: <ul style="list-style-type: none"> -increase numbers of extra care schemes - More people receiving intensive levels of home care 		LCC/DCs
Develop a carers’ strategy to ensure all agencies are supporting informal carers	LCC	LCC ASCS
Support more older people to access a Direct Payment for their social care services	LCC/ASCs	LCC ASCS (Older and Disabled People’s Services (O&DPS))
Housing and the Home		
Older people get appropriate housing support services wherever they live, regardless of	Chief Housing Officer	District Councils

Priority Issue	Delivery Mechanism	Lead Agency
tenure.	Group (CHOG)	(DCs)
Numbers of older people with a support plan for housing related support services, wherever they live, regardless of tenure.	Supporting People Commissioning Body (SPCB)	DCs
<p>To ensure an increased number of older people take-up property-related services including adaptations and disabled facility grants applications, private sector housing grants for older people, properties brought up to the decent homes standard in the private sector.</p> <p>Increase the use of community alarms to support independence in older people.</p>		<p>DCs</p> <p>DCs</p>

STRATEGY

for

AGEING WELL IN LEICESTERSHIRE

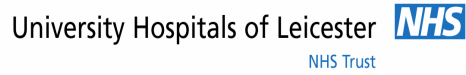
2008 – 2011

**‘Old age is like everything else. To make a success of
it, you’ve got to start young’**

Theodore Roosevelt

**Produced in collaboration with County Integrated
Partnerships for Older People and LAA Older People’s
Steering Group**

COUNTY INTEGRATED PARTNERSHIPS FOR OLDER PEOPLE AND LAA
OLDER PEOPLE'S STEERING GROUP



O.P.E.N.
(Older People's
Engagement Network)



Introduction

This strategy has been drawn up in conjunction with the Older Person's network and the County Integrated Partnership for Older People (CIPOP). It outlines the high level objectives we expect to deliver for our ageing population in Leicestershire, to ensure that older people are not excluded from participating fully in the community in which they live.

By highlighting the issues facing older residents it is hoped that we can work with our strategic partners to ensure that we make Leicestershire a good place to live as you get older. The term older people can apply to different groups of the population depending on the individuals and their circumstances. There are aspects of this strategy relevant to all those over 50 and others relevant to only those aged 75 and over.

The changing age structure of the county will be a major factor in developing services which respond to the community.

- By 2028, a quarter of Leicestershire's population will be over 65.
- The over 85s will be the fastest growing age group 1.8% in 2003 to 3.6% in 2028 (11,000 to 26,000 people).
- The Black and Minority Ethnic (BME) retirement age population increased by 16.7 per cent between 2001 and 2004. Half of this growth was in the Indian population.
- 20% of 50+ live alone and over 50% rarely see neighbours
- Less than half aged 45+ involved in some form of learning
- OP are currently biggest users of health and social care
- By 2015 there will be over 9000 older people with dementia and over 20,000 people with depression in Leicestershire

When asked, older people have strong views about the factors that make a difference to their lives and keep them independent. Adequate services and access to good information are seen as essential as well as being able to have choice and control over their own lives and being able to help others are seen as central to having an enjoyable life.

A shift is needed in the way that we think about older people, often seeing people as dependent and frail rather than as citizen's with a contribution to make. Account needs to be taken of the whole range of issues that are important to older people to ensure better outcomes which help older people to feel more valued and in control of their lives. There are a number of areas where the older people's network in Leicestershire has said they would like to see this happen;

1. Communities
2. Income and wealth
3. Keeping active and busy
4. Health
5. Social Care
6. Housing and the home

These themes are the basis for the following chapters of this strategy document.

1. Communities

The term 'community' is used here to capture the many aspects that make older people feel involved, informed and a true part of the community in which they live. A community is a living, vibrant, ever-changing place. There are many different factors that help people to fully participate in their communities; engagement in local issues and the development of services, good information and advice, availability of services across all rural areas, good transport systems to facilitate people getting out and about.

Many older people, especially those living on their own, are at higher risk of social exclusion. Thus older people have a high stake in the stability and well-being of their local community and the effective delivery of local services. The positive contribution older people make within their communities is also often not acknowledged.

In 2001, 20 per cent of the over fifty population lived alone, rising to 50 per cent for those over 85. The increases witnessed in the number of people living alone are expected to continue. National research carried out in 2006 for Help the Aged showed that 13 per cent of people aged over 65 are 'often or always lonely'. While there is no direct results measuring loneliness locally, the Leicestershire Social Capital Survey in 2006 found that although 42 per cent of people over 60 see their family at least once a week, a sizable minority of 20 per cent never see their family, or only see their family once a month. Similar proportions (28%) rarely see their friends. Over half of older people rarely see their neighbours, and the concern with a neighbourhood with low connections is that if the need arises, people do not feel they can rely on neighbours (and vice versa). Strong evidence exists of a connection between loneliness and poor mental health, in particular depression and anxiety amongst older people.

Technology has an important role to play and digital inclusion aims to reduce the 'digital divide' within communities to enable everyone to have equal access to the benefits of ICT. A local survey showed a clear age divide within Leicestershire with 36 per cent of residents aged 60+ not having access to a PC compared to just 15 per cent for those between aged 25-44. National research also shows rural areas, with older age structures, have internet usage up to ten per cent lower than in urban areas. A range of agencies are already providing learning opportunities for older people to develop computer skills.

1.1 Involvement in the community and using local services

The local government White Paper, Strong and Prosperous Communities (2006), seeks to give communities and service users a greater say in how local services are delivered. Making services more relevant to users is important as only 44 per cent of older residents were satisfied with how the way things were being run in 2006. However this picture is not entirely clear, as, when asked about public service delivery overall in Leicestershire, the Social Capital survey showed that overall 80 per cent of older people to be satisfied with the delivery of public services. Older people showed higher satisfaction levels with healthcare, waste management and libraries, than policing, social care, public transport and housing.

Only 16 per cent of older people from the Leicestershire Social Capital survey tended to agree or definitively agreed that by working on their own they could influence decisions

that affected their area, however, almost two-thirds (62%), thought that they could influence decisions that affected their area by working together.

In the User Satisfaction survey only 20 per cent of older people were satisfied with opportunities for participation in local decision-making. As older people are more likely to vote than younger people, 81 per cent in the last general election and 73 per cent in Council elections, an ageing population will mean older people are going to have an important influence on the democratic process.

A Countywide Older People's Engagement Network (O.P.E.N.) has been established to develop a stronger voice for older residents. The Network represents over 25 different local groups and representatives from the network attend key planning and policy groups with strategic partners. The network follows the Better Government for Older People principles.

Effectively engaging older people also means that they need to be well informed and advised. This enables people to be aware of services and how to access them in an appropriate and timely way. Within every community there are many different forms of information and many different providers of advice information. The Leicestershire Together partnership 'Connect' consists of a website, help-points and service shops to help people navigate their way through key, multi-agency information, which includes specific information for older people. Leicestershire's information and advice booklet for older people 'Ageing well in Leicestershire' gives a broad range of cross-agency information and so far 12,000 copies of these have been distributed.

The way older people view their communities and how they perceive others view them is important. On average older people are generally more positive than the rest of the population about the areas that they live in. For example the Social Capital survey found that 83 per cent of people aged over 60 in Leicestershire thought that their neighbourhood was either a very good or good place to live. This is higher than the 75 per cent average for all ages. Many older people who have lived in one place for a long time identify strongly with their neighbourhood. For some people neighbours are vital and if these relationships did not exist some older people could feel vulnerable or isolated.

To enhance local areas, communities need to be outward looking and engaged in the wider society. Both the User Satisfaction and Social Capital surveys asked similar questions on whether people from different backgrounds are getting along together. Overall older people agreed, 55 per cent in the USS survey and 62 per cent in the Social Capital Survey. This may reflect what's happening in the communities and not necessarily a reflection on individual tolerance. However there is anecdotal evidence from focus groups of some areas in Leicestershire with intergenerational differences, and of clashes between 'elderly residents' and newcomers, especially young people.

Crimes such as distraction burglary have a negative impact on older people's quality of life. In 2005, there were 239 distraction burglaries reported within Leicestershire, an increase of 21 per cent over the last three years. However, even though the frequency of offences is low the impact of this type of offence on the victim is generally much higher than other burglary offences and the average age of a distraction burglary victim is 78. Fear of doorstep crime among the elderly has seen local councils setting up more

than a thousand, including 40 in Leicestershire, 'No Cold Calling Zones' across England. Figures show overall crime in these areas can drop by as much as 80 per cent, with an even bigger impact on doorstep crime such as distraction theft. The fear of crime is something which has a big influence on individuals' lives, reducing their social interactions, particularly in the evenings, and the perception of the local area. A third of respondents in the Leicestershire Town and Villages survey in 2006 expressed general worry about crime, without having experienced a specific crime in the past year. Those aged 75 and older being amongst the most 'worried'. Strategies which aim to reassure older people and build more cohesion communities may be one way of reducing worry about crime.

Activities that offer fun, enjoyment and personal fulfilment do more than contribute to good quality of life; they can also improve mental health and help older people adjust to major life changes like bereavement. Participation is also an important element in developing a cohesive community and improving community well-being. The Leicestershire Social Capital Survey showed that 85 per cent of older people agreed that contributing to the community was important and three quarters of all respondents over 60 gave unpaid help to a group or club in the twelve months before the survey. Evidence locally illustrates the importance of older people as volunteers. LeicesterShire Volunteer Centre network has identified older volunteers as a target group with extra resources needing to be placed into promoting volunteering to this group, so that older people can be offered the full range of local volunteering opportunities offered by Volunteer Centres. While large numbers of older people clearly do volunteer, only 15% of new volunteers recruited by a Volunteer Centre/Voluntary Action Centre last year were in the 55+ age group (only 5% were over 65). Nationally, research has shown that people aged 65+ are the most likely *not* to volunteer (*Helping Out, A national survey of volunteering and charitable giving*, Office of the Third Sector, 2007). Age Concern Leicestershire and Rutland have over 600 volunteers aged 50+ (62% of their total number of volunteers) working in a range of roles including befriending, shop work and day services.

For many cultural and leisure service providers in Leicestershire, older people are an increasingly important client group. The Leicestershire User Satisfaction Survey showed that parks and open spaces are the most frequently used recreational activity for older people, with 30 per cent of older people who used them saying they did so at least once a week. Where older people used Libraries they did so mostly once a month. Finally, sports facilities were used infrequently. For older people who are frailer disabled access to local facilities becomes increasingly problematic, and often separate social care services are the only option, further impacting on their loss of contact with their local communities. A target is included in the Local Area Agreement for older people to use a direct payment instead of a day centre so that they can continue to pursue their interests and arrange their own cultural and recreational activities closer to home.

In Leicestershire 72 per cent of the population aged over 65 live within half a mile of a Post Office, a recent survey showed some 82 per cent of local businesses think a local post office closure would have a significant negative affect on the local economy. Older people see beyond just having local services, but what it actually means to them, their community, the sense of connection and well-being as well as reducing the feeling of vulnerability.

To support the market town programme and Local Area Agreement, customer satisfaction research was undertaken in 2006 comprising of a survey of visitors and users in 17 town and village centres across Leicestershire. The survey found people generally had positive opinions about Leicestershire market towns with just under two thirds of respondents agreeing that the towns in Leicestershire were a good place for older people to visit. Where improvements were necessary older people stated that a greater range of shops (17%), the cleanliness and tidiness of the centre (15%) and, providing more parking (8%) were the most important issues.

1.2 Getting out and about

Problems getting around outside the home have major repercussions for older peoples' independence. Results from the last two censuses have shown that access to a car has become an increasing essential element in everyday life in Leicestershire. Car ownership declines with age, so that two thirds of those people aged 85 and over live in a household without a car. This is mainly because of economic necessity or health reasons. Older women in particular are less likely to have a car at all ages above 50, rising to nearly three quarters without a car in the over 85s.

The importance of car usage for older people is supported by the County Council's Road Transport Team's SAGE (Safer Driving with Age) programme. This is for people aged 60 years, aiming to keep them driving safely, increase confidence, refresh and update skills and knowledge.

Many older people rely on public transport, and those without access to a car will be those generally who are poorer and have worse health, and so may have more specific requirements from a transport service that is accessible, flexible and affordable. The current Local Transport Plan aims to improve access to employment, education, health care and shopping facilities particularly in areas of greater social exclusion. Access to many local centres and county towns is provided by an hourly bus service network and 95 per cent of households, including 76 per cent of rural households, are now within 800 meters of a hourly bus service. This is a significant improvement on 2001/2 levels. However, some older people would not be able to walk even these distances to a bus stop. The number of low floor buses on local routes has increased from 24% in 2002 to 60% in 2007. Free travel for older people on local bus services was introduced from April 2006. In Leicestershire over 62% of people aged 60 or over have a bus pass (higher than the national average of 56 per cent). The take-up tends to be lower in rural areas than in urban environments as there is often less and sometimes no opportunity to travel by bus in rural villages.

The Leicestershire User Satisfaction Survey in 2006 showed that a quarter of respondents over 60 had never used the local bus service. Around 23 per cent of those older people using buses do so at least once a week and only 9 per cent use buses on a daily basis. The older people using bus services were generally satisfied with the local bus service with only a minority, around 11 per cent, being dissatisfied. Local transport services need to be able to meet the needs of older people, for example specific communication and mobility issues that may arise with old age. Over the next two years the introduction of professional standards for drivers, supported by the Certificate of Professional Competency, will aim to ensure drives are adequately skilled in disability awareness and customer care. They had lower levels of satisfaction with

the provision of public transport information, and 48 per cent had not received any local information on local transport services in the last twelve months.

Leicestershire's User Satisfaction Survey showed that 22 per cent of respondents over the age of 60 thought that road and pavement repairs needed improving in the local area. A recent national survey found that 56 per cent of pensioners go out of their way to avoid routes that may have faulty or damaged pavements. Locally collected data on the condition of the local footpaths shows that Leicestershire has one of the best maintained networks in the country.

1.3 Priority Issues

- C.1 Older people need to feel safe and secure within their communities.
- C.2 Older people to feel they are socially included within their communities.
- C.3 Transport services need to be able to meet the needs of older people in each locality.
- C.4 Older people need to be able to access a full range of facilities in their local communities.
- C.5 Older people need relevant, timely, cross-agency advice and information at 'first contact' with any of the key services.
- C.6 Older people have a strong voice and are actively engaged in decision-making through the Older People's Network and Older People's Champion Network.

2. Income and Wealth

Recent research by Help the Aged showed that while the poorest older people live throughout England and Wales, very high proportions are living in the most disadvantaged wards on income-related benefits, creating areas of acute disadvantage. The Indices of Deprivation 2004 showed that 13,479 people over 60 live in income deprived households in Leicestershire, about 11 per cent of the over 60 population. The UK Fuel Poverty Strategy has set a target that England and Northern Ireland will seek an end to fuel poverty for vulnerable households by 2010. These are defined as households spending over 10 per cent of their income on maintaining a satisfactory heating regime. In Leicestershire 6 per cent, or 15,000 households, are categorised as in fuel poverty, most which will be older households. The causes of fuel poverty are complex; although local schemes to make housing more energy efficient is one practical way to help households.

Of 20% of pensioners classified as disabled only 14,980 in Leicestershire are in receipt of the disability benefit Attendance Allowance. This is a gap of 39% as potentially 9,500 older people are missing out on this entitlement. A project has been established in partnership with the County Council, the Pension Service and Age Concern Leicestershire and Rutland to try and increase take-up by 2009. Recent results from the Department of Work and Pensions show the take-up of pension related benefits is less than three quarters of those entitled. Barriers to take-up can be complex and it is usual for one customer to have multiple barriers and needs. Therefore to improve take-up services need to be tailored to support individual customers.

Having an adequate income depends on being informed; many older people do not know where to go to or who to ask for help in this area. The way information is provided is important as older people need financial advice from a source they can trust. A recent study commissioned by the National Audit office of older people who had taken part in benefit take-up campaigns, showed the dramatic effects that increases in weekly incomes had on their well-being, quality of life and independence.

National research at the end of 2004 showed that twice as many women than men rely on means tested benefits. Currently around 85 per cent of men reaching state pension age are entitled to full state pension, compared to only 30 per cent of women. Women's lower wages through their career plus interruptions to their earnings explains this difference. Women's pensions are set to increase as forecasts suggest 70 per cent of women born in the 1960s and retiring after 2025 will accrue full entitlement.

Income is only one component of wealth. Managing finances and avoiding debt can be a difficult issue for some people. Again a clear 'advice gap' has been identified with older people needing better access to financial advice to manage retirement, and the various products available to them. Research from Age Concern revealed that the over 50s are moving into a 'buy now, worry later' mindset with the rate of growth of debt faster among the 'fifty-somethings' than younger age groups. Aside from debt, older people can also be vulnerable to purchasing unwanted and/or poor quality goods and services. These are therefore all important areas to ensure older people receive good information and advice about.

Around 74 per cent of people aged between 65 and 74 own their own home. Older people are increasingly 'asset rich' but 'cash poor' and are boosting their income by unlocking the value of their homes. By 2005 the market for equity release schemes had increased 50-fold since 1993, and was one of the fastest growing areas of the financial services industry. Awareness of these schemes is generally high but there is widespread suspicion on whether equity release is a good idea.

2.1 Priority Issues

- I.1 To aim to retain increased numbers of people over age 50 in employment.
- I.2 Increase the take-up of income benefits amongst older people:
 - Needs to include advice and improved communication across agencies.
 - Address fuel poverty.
- I.3 Provision of advice and early identification of people with financial difficulties (e.g. poverty, debt) via multi-agency collaboration:
 - Include pre-retirement and good financial advice

3. Keeping Active and Busy (including active learning, volunteering, employment)

In the Communities chapter (page 5) the importance and benefits of being active and personally fulfilled were highlighted. There are many different ways in which people achieve this, including education, volunteering and working.

Research has shown older people gain real health benefits from learning. However a NIACE survey shows that over one-half of all adults over 65 in England have not participated in any learning since leaving full-time education.

Locally the 2006 Leicestershire household survey found just less than half of people (44%) aged over 45 were involved in some form of learning in the last twelve months, and only 8 per cent were currently in learning. National evidence highlights, the most common reason for not learning is the lack of funding, followed by no suitable course or no course of interest. The lack of signposting advice for this age group is a possibility as there is some evidence adults make limited use of information services for this area.

Learning opportunities come in many forms, aside from formal education. People aged 50+ are significant users of Library services, with them taking part in computer courses, taster sessions, local history sessions, reading and story-telling groups. Some of these activities bring inter-generational opportunities, such as grandparents taking grandchildren to children's reading sessions. These activities, and others within the library setting (e.g. coffee mornings), also provide an important social opportunity. Older people are also key users of Environmental and Heritage services. For example, 71% of visitors to the Records Office (used for researching local history and culture) in 2006 were aged 55 years and over. Centre Stage, which provides live drama performance around the county, involves over 500 people in their 50's and 60's as volunteers, and 75% of people in the audiences for these shows are aged 50 years or over.

The role of volunteers is crucial across communities. Many areas of the County Council value the role of volunteers in delivering local projects. The Leicestershire Libraries 'Library Service at Home' is based on using volunteers to serve isolated, mainly older, people. The Local Area Agreement 2006-9 includes targets to increase the number of active volunteers linked to providing services to older people. This remains a priority for 2009 onwards.

It is projected there will be one million fewer working-age people under 50 by 2022 and so older people are expected to play an increasingly important role in the labour market. This is a key policy target group for government policy through schemes such as the New Deal 50 plus. Although economic activity rates among those aged 50 have increased over the last ten years, activity rates for men and women in Leicestershire still decline with age. Only 49 per cent of males and 35 per cent of females are economically active at the age of fifty, compared to between 84 to 95 per cent for younger people.

Research has shown that early withdrawal from the labour market can increase poverty and have a negative effect on health, including depression and worsening mental health, related to the increase in social exclusion and isolation. More flexible working

arrangements can keep people in employment rather than losing them when they decide they no longer wish to work full-time. It will become increasingly important, as the population increases, that these options are available to older workers to help minimise early exits from the labour market.

The main reason for inactivity and early retirement is having an illness or disability that limits people's ability to work. Previous research has suggested that one in ten incapacity benefit claimants may be able to return to some form of employment.

Age discrimination is one barrier to increasing the over fifty labour market participation rates in the workplace. A 2005 report highlighted that 16 per cent work force aged between 45 and 74 years in Leicestershire had experienced direct discrimination because of their age, and 43 per cent thought that the negative attitudes of employers was a main barrier when looking for, or changing jobs.

In October 2006 new laws made it unlawful to discriminate against an employee under the age of 65 as age is no indicator of competence in a job. Although for some campaigning organisations such as Age Concern and Help the Aged these laws do not go far enough. It remains to be seen what the full impact will be, but as already mentioned, structural change may already be occurring as employment rates of the over 50's compared to those of aged 35-49 had narrowed by 4 percentage points in 2005.

Finally, the change in law overlooks that over 50's fail to get work that matches their abilities and skills. On average the over 50's in England, earn 26 per cent less in a new job compared to their previous job.

3.1 Priority Issues

- K.1 Provide a co-ordinated approach to volunteering for people aged over 50 who are not in employment.
- K.2 Ensure a full range of meaningful cultural and learning activities for people as they age.

4. Health

In Leicestershire the cause of death varies with age, with cancer a more important cause for the under 65's (371 deaths in 2006), and circulatory diseases a more important cause for the over 65's (1,681 deaths in 2006).

Although no details were collected on specific illnesses the 2001 Census gives the most comprehensive guide to the number of residents with the most serious health needs in Leicestershire. Overall 13 per cent of people over 50 living in households have a limiting long term illness and 'not good' health. This increases from 9 per cent for those in the fifties, to nearly 30 per cent for those aged over 75.

A key national issue is tackling health inequality, reinforced by the publication of a government strategy: Tackling Health Inequalities: A programme for action. A recent Leicestershire Health Equality report found that at the age of 65 a man living in the worst-off areas of Leicestershire and Rutland is likely to live a further 15.5 years. This is two and a half years less than a man in the more affluent areas.

Over recent years significant progress has been made on reducing emergency admissions to and delayed transfers of care from hospital for older people, Locally performance is relatively good but remains a priority. The role of consultant geriatricians historically based in hospital is being reviewed locally with the aim of providing this expert care in the community to support primary care staff particularly around care of older people in residential care. This will be a pilot project from 2008 funded within the Local Operating plan of the PCT.

1600 older people from Leicestershire and Rutland die in acute hospital wards in University Hospitals Leicester each year plus another 70 in A&E... (excluding unexpected deaths and those following surgery). ***The Decisions At Life's End (DALE) project aims to reverse this trend and give as many people as possible the choice to die at home.*** DALE has been funded from a Partnership for Older People Project grant from the department of health and runs for two years from 2007-9. The expectation is that the new service achieves a systemic change in the way services are provided in future and that resources can be shifted to fund the scheme in the longer term. The project will be evaluated by Leicester University and is overseen by the County Integrated Partnership for Older People (CIPOP).

Some population groups are at a higher risk of stroke than others. The risk increases with age, each year 10,000 people over 55 years have a stroke in England information from the data from Health survey in England show that African Caribbean and South Asian men the prevalence of stroke is between 40-70% higher. There is good evidence that programmes of prevention and change to lifestyles can reduce likelihood of a stroke especially stopping smoking, reduced alcohol intake, and improved diet and physical activity. There is evidence that people who have had a stroke are more likely to survive and recover if admitted promptly to a hospital-based stroke unit with specialist treatment and rehabilitation programmes to support them afterwards. Services in Leicestershire have recently been reconfigured to develop specialist services in 2 community hospitals. An n integrated stroke service is being developed. In line with the National

stroke strategy led by Leicestershire and Rutland PCT. Development in Stroke services has been prioritised by the PCT in the LDP for 2008 onwards.

Prevention is critical to supporting a healthy older age in 2005 there were 39 deaths in Leicestershire due to falls and these are mainly females over 75. Falls clinics have been set up in Leicestershire to provide a programme of physical activity to improve balance and mobility, increasing independence, confidence and well-being. The PCT has prioritised the development of equitable Falls services across Leicestershire within the LDP. EMAS (East Midlands Ambulance Service) respond to many calls for older people who have fallen and recently have aimed to deflect as many people from unnecessary admission to hospital. Recent figures show that 39 people in the past 8 months have benefited from this intervention. Falls prevention is a priority for the health and social care community and a new Falls prevention and Bone Health strategy is being developed locally, led by UHL.

The increasing importance of mental health is highlighted in a recent report which found that in Britain one in four people over 65 have depression (or serious symptoms), and one in five people over 80 suffer dementia. It also predicts that by 2021 one in 15 Britons will be an older person suffering a mental health problem. Depression in older people is under-diagnosed, and even in diagnosed cases, older people had not benefited from some of the developments seen for younger adults. Local estimates show that age related mental health problems will increase in prevalence in proportion to the over 65 population;

Table 1 Forecast of prevalence rates for dementia and depression in the over 65 age group for LLR

	2008	2010	2015	Change 2008 to 2015
Dementia¹:	7,865	8,257	9,435	+20%
Depression²:	16,260	17,205	20,145	+24%

The report concludes that age discrimination remains a fundamental problem in understanding mental health, leading people to assume, that it's inevitable older people will be depressed, or that little can be done. However, as the report argues mental health problems in later life are often preventable and treatable.

Older people can benefit very significantly from undertaking the recommended levels of physical activity. It promotes mental and physical health, helps maintain a healthy weight, and reduces the risk of serious diseases including heart disease and stroke. The maximum health benefits accrue from at least half an hour exercise of moderate intensity on at least five days a week. Physical activity could offset two key aspects of

¹ Based on differential rates for men and women in 5yr age bands.
² Based on estimate of 15% of over 65 year old population.

the normal ageing process: loss of muscle mass and reduction in heart and lung function. Sport England's recent Active People survey shows that activity declines with age and only 15 per cent of those over 55 had at least one 30 minutes walk in the last four weeks in Leicestershire. Walking for Health schemes are local initiatives attempting to increase this figure.

A disproportionate number of pedestrians over sixty are killed and seriously injured in comparison to other groups, although since 2002 this number has slightly decreased. Many of the transport measures in the latest Local Transport Plan contribute to improve the conditions for older road users, particularly those to reduce traffic speeds and to improve the pedestrian environment.

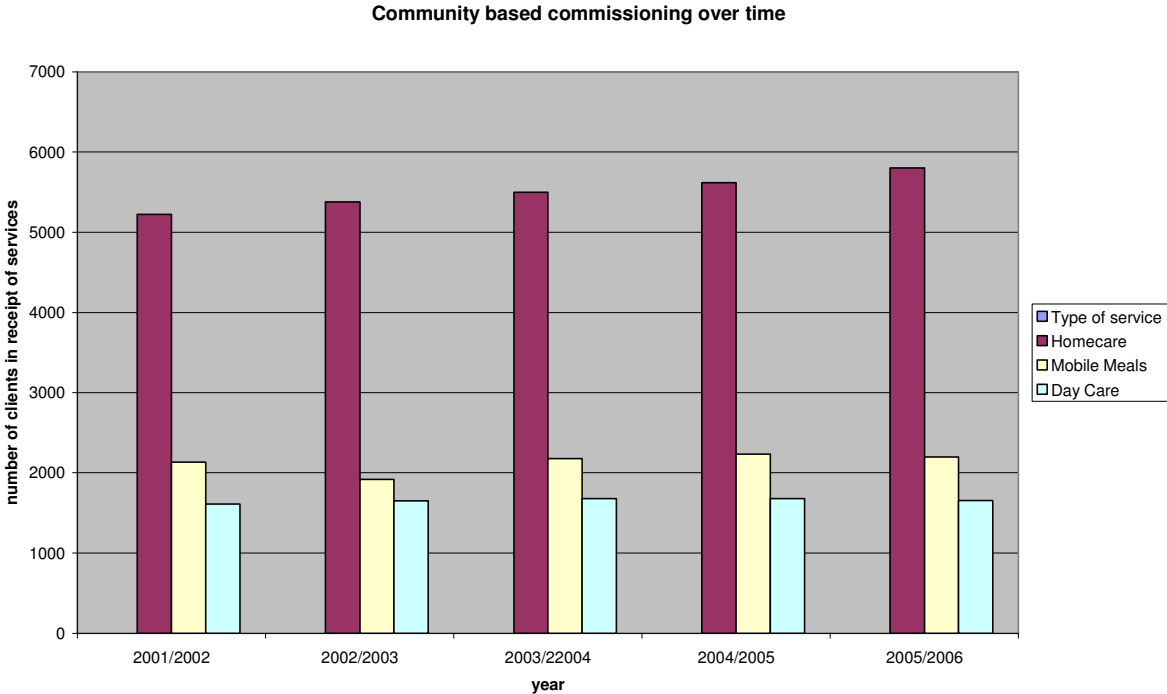
4.1 Priority Outcomes - Health

- H.1 Continue to reduce number of emergency hospital admissions, and support quality discharges to avoid re-admissions, for people aged over 65.
- H.2 Develop community based rehabilitation services to meet the needs of people that have had strokes and falls.
- H.3 .Review role of consultant geriatricians in order to shift care closer to home
- H.4 Improve services to people with Dementia and aim to increase support in community through role of consultant Psychiatrist.

5. Social Care and Carers

Locally the key priority remains for social care to support outcomes for older people in line with the White Paper 'Our Health, Our Care, Our Say' and to arrange services which encourage and support people to live independently in their own homes with local community support. In Leicestershire over 10,000 older people each year receive social care support from the County Council. The level of home care provided to older people has increased year on year since 2000, and there has been a proportionate decrease in the numbers of people entering care homes.

The following chart illustrates the trend over time of services provided to support people to live in their own homes.



There is however still around £39 million gross spent on residential care by the County Council, the largest amount on any care service with over 70 people a month still going into care. Alternatives, like extra care are being explored at present. Whilst around 2000 people are funded by the County Council in care settings there are equal numbers of people funding their own care. The County Council has responsibility for ensuring that care standards in the County are as high as possible including for those people who are self-funding. This is achieved in a number of ways.

Guidance advice is provided by all Access duty teams to self-funders and the County Council has a duty to ensure that assessments are undertaken of vulnerable people who may self-fund.

The Safeguarding adults policy protects vulnerable adults including older people from abuse and places a duty on local authorities to investigate any referrals of abuse and to take appropriate actions to protect individuals. This is a multi-agency strategy overseen by the Adult Protection Committee for Leicestershire. Each year there is elder abuse awareness week when agencies and the public have the opportunity to raise awareness locally to possible abuse and the need to report victims and to take action to eliminate this

Putting older people at the heart of services is a priority for all agencies however this tends to be done in different ways. A number of initiatives have been taken under the Dignity in Care strategy across health and Social Care agencies but the Older people consulted have indicated that many older people in Leicestershire are still subject to discrimination and often not treated with respect by service providers. An underpinning theme must be that older people are put at the centre of services they use. To this end a Dignity in Older Age Charter will be produced in Leicestershire and commitment sought from different agencies to this.

The White paper expects Councils to promote self directed care, including self assessment, individual budgets and direct payments being under the control of service users. Direct Payments are cash payments made in lieu of social service provisions, to individuals who have been assessed as needing services. Direct payments allow more choice and flexibility on what care people want and services they require and give greater choice and control over their lives. They help increase the opportunities for independence, social inclusion and enhanced self-esteem. Currently in Leicestershire 431 people are receiving services this way, of which 114 are older people. Over 50 older people use a direct payment as alternative to day care. The government expects more self-directed support to develop including self-assessment and individual budgets controlled by users and carers. There is a target within the LAA for 200 older people to use direct payments by April 2009 for day time activities.

Users and carers should expect practical help and other support to arrive in a timely fashion soon after their problems have been referred to Social Care Services. When an older person requires help an assessment of social care needs is carried out. In Leicestershire 90 per cent of people's assessments are completed within four weeks', and 93 per cent then receive their subsequent care packages within four weeks. Both these figures are some of the highest in the country and reflect well the arrangements in place that the Council has. Feedback collected following assessments show a high level of satisfaction from new users with some suggestions that written information and advice about other services is an area where improvements could be made.

Leicestershire's Adult Social Care Service seeks to promote independence for service users, and maximise their skills and abilities. HART (Home Assessment and Reablement Team) provide home care services to enable people to maximise their independence, as do reablement services based within County Council residential care homes.

However, with a growing older population who are living longer there will be an increasing need to ensure social care is focussed on those with greatest need but also supports all vulnerable older people to live as independently and as safely as possible;

The county council is the lead agency for adult protection and has a duty to investigate all allegations of abuse

The County Council has lead responsibility for services to informal carers and receives a grant each year for carers' services; from April 2008 this grant will be part of the Area Based Grants linked to the LAA. Carers' assessments are undertaken by adult social care staff as part of the care planning process however as there are almost 70,000 carers in Leicestershire and they come from all walks of life the responsibility to support carers is across agencies. As more older people are supported to live at home, support to carers' will be playing an essential component of community care services. 47,198 carers are providing care for 1-19 hours a week with over 10,000 carers providing over 50 hours care. Over 35,000 carers are in full-time employment, As lead agency the County Council has produced a Carers' strategy 2008-11 which is currently out for consultation. In line with national policy the direction of travel in Leicestershire is to provide more support for carers to self-assess and direct their own support arrangements through a direct payment.

5.1 Priority Issues

- S.1 To develop a Leicestershire-wide 'Dignity in Older Age' charter, putting older people at the centre of services.
- S.2` To ensure that the social care workforce is suitably trained and qualified to provide appropriate levels of care locally
- S.2 Ensuring all agencies are protection vulnerable older people from abuse through staff training and referral processes.
- S.2 Support increasing numbers of older people to live independent lives at home and increase range of community based services for older people.
- S.3 Develop a carers' strategy to ensure all agencies are supporting informal carers
- S.4 Support more older people to direct their own care through self-assessment and direct payments.
- S.4 `To ensure that older people from ethnic minorities have appropriate levels of care and flexible services

6. Housing and the Home

In 2001, 27 per cent of the 50 and over population owned their property outright, increasing to a peak of 74 per cent of 65 to 74 year olds, and then declining for the late old ages to only 47 per cent for those 85 and over. In 2001, the number of people having a mortgage declined with age, the biggest decline around the retirement ages of 60 to 64. With larger mortgages and interest only mortgages becoming more common, this group could increase in older ages. For those aged over 50, social renting is of greater importance than to the rest of the population, with 9 per cent renting from local authorities and 2 per cent from housing associations.

The social housing stock across county is due to meet the decent homes standard by 2010. In the council owned sector this will be achieved through a mixture of stock transfer programmes in three districts, an Arm's Length Management Organisation in another one, whilst the remaining three districts will meet the decent homes standard and retain their stock.

The private sector stock will be addressed through the Housing Health and Safety Rating System (HHSRS) setting minimum standards. An aim in meeting this standard is to embrace a range of approaches which will involve assistance, advice and encouragement, using enforcement as a last resort. Home Improvement Agencies may play an important role in helping to achieve decent homes in the private sector.

Home Improvement Agencies funded through Leicestershire Supporting People and working in partnership with District Councils contribute to the achievement of this target through support to vulnerable households in private sector accommodation. This includes advice and information about access to disabled facility and home repair grants.

6.1 Supported Housing

There is now a greater drive to integrate housing in a more holistic approach to service planning and delivery. Two of the Local Area Agreements outcomes for Older People relate to the improvement of support for people living at home and to provide a wider range of housing options. At present there are 123 care homes across Leicestershire with 85 per cent of the care provided through independent sector providers. There is an extensive amount of sheltered housing for older people available across the county, but only four extra care homes. The Department of Health expects local authorities to continue to develop alternatives to residential care and has established a national target for an increase in the overall provision of extra care schemes across the country. Extra care housing supports older people who have both care and support needs and offers the opportunity to retain independence.

The Housing and Support for Older People project recommended the need to develop models of extra care housing based on local need, review community alarm control centre provision, promote community alarm service, and develop client need-led floating services and equalising access to aids and adaptation and private sector maintenance.

Housing requirements and preferences differ with age but local consultation shows a strong message that older people prefer to stay in their own homes for as long as possible. Housing needs surveys demonstrate a poor fit between the housing needs of older people and the available provision of housing designated for older people. Older people now expect more in terms of space and having self-contained facilities. District surveys demonstrate that many older people are unsuitably housed and, in the private sector particularly, often under-occupy their properties. Property maintenance, especially in the private sector, is a very important issue for older people, and tenure has been identified as an absolute barrier to receiving a visiting support service. The point was made that although many services are available, older people don't always know of them or, if they do, how to gain access to them.

6.1 Housing and the Home

- HH.1 Numbers of older people with a support plan for housing related support services, wherever they live, regardless of tenure.

- HH.2 To ensure an increased number of older people take-up property-related services including adaptations and disabled facility grants applications, private sector housing grants for older people, properties brought up to the decent homes standard in the private sector.

- HH.3 Increase the use of community alarms to support independence in older people.

Taking These Priorities Forward

The action plan attached shows how each of these priorities is being taken forward across agencies.

National Indicator Sets

The Government has identified a number of Performance Indicators in its National Indicator Set, which relates to this strategy. These are as follows:

NI 138	Satisfaction of people over 65 with both home and neighbourhood
NI 2	% of people who feel that they belong to their neighbourhood
NI 175	Access to services and facilities by public transport, walking and cycling
NI 6	Participation in regular volunteering
NI 127	Self reported experience of social care users
NI 128	User reported measure of respect and dignity in their treatment
NI 136	People supported to live independently through social services (all ages)
NI 135	Carers receiving needs assessment or review and a specific carer's service or advice and information
NI 130	Social care clients receiving Self-Directed Support (Direct Payments and Individual Budgets)

A Strategy for Ageing Well in Leicestershire

Summary of the Priority Issues

This list of priority issues is lifted from the draft of the Ageing Well in Leicestershire Strategy. These key issues arose from the Local Area Agreement for Older People consultation event in September 2007. Some of the points overlap or cut across different service areas.

Priority Issue	Delivery Mechanism	Lead Agency
COMMUNITIES		
Aim: Older people feel part of their neighbourhood		
Older people need to feel safe and secure within their communities: <ul style="list-style-type: none"> - increase numbers of cold calling zones - reduce bogus callers - continue with initiatives via Community safety group to reduce fear of crime and increase security advice - increase numbers of fire alarms for older people 	Home Safety Group / County Integrated Partnerships for Older People (CIPOP) Community safety Plan	Leicestershire County Council (LCC) Trading standards Fire services
Older people take part in their communities and using local facilities: <ul style="list-style-type: none"> - Give people appropriate advice about befriending schemes - Increase numbers of volunteers to support dependent people - Develop older people's champions via OPEN to disseminate information in local areas - Support and advice to people to develop a 'life change plan' around key stages as they age e.g. retirement, bereavement - Libraries to identify people over 60 who stop using services to check their well-being - Increase Intergenerational activities via schools, youth clubs 	CIPOP Local Area Agreement (LAA) LCC Corporate group	Community Voluntary Service (CVS) /VOL Agencies CVS Blaby Older People's Engagement Network (OPEN)/ CVS Community Partnership (CCP) All LCC LCC
Transport services need to be able to meet the needs of older people in each locality		

Priority Issue	Delivery Mechanism	Lead Agency
<ul style="list-style-type: none"> - Transport plan to take account of needs of older people - Directory of community transport and voluntary sector providers - Undertake survey of use of transport by older people, their experience and usage - Promote safety on roads for older people 	LCC Transport Plan	LCC
<p>Older people need relevant, timely, cross-agency advice and information at 'first contact' with any of the key services:</p> <ul style="list-style-type: none"> - Key partners to pilot 'first contact' signposting in Blaby via First Lottery and NW Leics via agency funding 	LAA Strategic Board for benefits take-up	CIPOP
<p>Older people have a strong voice and are actively engaged in decision-making through the Older People's Network and Older People's Champion Network:</p> <ul style="list-style-type: none"> - Increase numbers of Older people in network and links to local older people's groups - Increase numbers of older people in planning groups - Recruit and train Older People's champions in each locality, agency and service providers - Roll out Dignity in Care Charter with care services providers 	OPEN	CIPOP
INCOME AND WEALTH		
Aim: Older people to be supported to maximise income and use money more effectively		
<p>To aim for increased numbers of people over age 50 in employment:</p> <ul style="list-style-type: none"> - include in economic block of Community Strategy 	Economic block of LAA	East Midlands Development Agency (EMDA)
<p>Increase the take-up of income benefits amongst older people:</p> <ul style="list-style-type: none"> - identify and breakdown barriers to taking up entitlements needs to include advice and improved communication across agencies 	LAA	LCC Adult Social Care Service (ASCS)
<p>Provision of advice and early identification of people with financial problems (poverty, debt) via multi-agency collaboration:</p> <ul style="list-style-type: none"> • Include pre-retirement and good financial advice 		Citizen Advice Bureaus (CABs),

Priority Issue	Delivery Mechanism	Lead Agency
<ul style="list-style-type: none"> • Provide advice to avoid fuel poverty 		Money advice, vol sector
KEEPING ACTIVE AND BUSY		
Aim: Older people need to be able to access a full range of facilities in their local communities		
<p>Provide a co-ordinated approach to volunteering for people aged over 50 who are not in employment:</p> <ul style="list-style-type: none"> - Increase numbers of older volunteers across agencies - Increase numbers of older people who have access to a volunteer/be-friender for cultural and other activities - Link with LSE to develop training for volunteers - 	LAA	CVS/Vol Centres
<p>Ensure a full range of meaningful cultural and learning opportunities for people as they age.</p> <ul style="list-style-type: none"> - Transform adult social care approach to day services so more frail older people using direct payments to remain active in their local area - Develop a joined approach with adult education to provide more learning opportunities 	LAA OPEN	LCC ASCS LCC/Learning and Skills Council (LSC)
HEALTH		
Aim: To support more older people to live healthier lives with care closer to home		
<p>Reduce number of emergency hospital admissions, and avoid re-admissions, for people aged over 65:</p> <ul style="list-style-type: none"> - DALE end of life service - Develop services around care homes to reduce admissions - Pilot community-based rather than hospital based old age consultants to support care homes - Develop dementia strategy to support more people at home 	PCT POPP PCT PCT PCT/LCC	PCT/LCC CIPOP
<p>Develop community based rehabilitation service pathways to meet the needs of people that have had strokes and falls.</p> <ul style="list-style-type: none"> - develop stroke pathway across Health and social care 	PCT PCT	PCT CIPOP

Priority Issue	Delivery Mechanism	Lead Agency
<ul style="list-style-type: none"> - develop support to carers - establish new falls service and bone health strategy group - evaluate use of assistive technology to prevent falls 	PCT LCC – ASCS UHL	
<p>Have in place a clear, publicised strategy for meeting the health needs of older people across Leicestershire.</p> <ul style="list-style-type: none"> - undertake joint strategic needs assessment for Leicestershire - identify shared priorities for joint commissioning 	LCC PCT	
<p>Social Care and Carers and Housing Aim: Supporting independence of older people and carers</p>		
<p>Develop a Leicestershire-wide ‘Dignity in Care Charter’, putting older people at the centre of services.</p>		UHL, LCC, LPT, PCT
<p>Support increasing numbers of older people to live at home:</p> <ul style="list-style-type: none"> -increase numbers of extra care schemes - More people receiving intensive levels of home care 		LCC/DCs
<p>Develop a carers’ strategy to ensure all agencies are supporting informal carers</p>	LCC	LCC ASCS
<p>Support more older people to access a Direct Payment for their social care services</p>	LCC/ASCS	LCC ASCS (Older and Disabled People’s Services (O&DPS))
<p>Housing and the Home</p>		
<p>Older people get appropriate housing support services wherever they live, regardless of tenure.</p>	Chief Housing Officer Group (CHOG)	District Councils (DCs)
<p>Numbers of older people with a support plan for housing related support services, wherever</p>	Supporting People	DCs

Priority Issue	Delivery Mechanism	Lead Agency
they live, regardless of tenure.	Commissioning Body (SPCB)	
<p>To ensure an increased number of older people take-up property-related services including adaptations and disabled facility grants applications, private sector housing grants for older people, properties brought up to the decent homes standard in the private sector.</p> <p>Increase the use of community alarms to support independence in older people.</p>		<p>DCs</p> <p>DCs</p>

Conclusion

This strategy has drawn together a large amount of both local and national data and research, and gives strong and consistent messages about the factors that make the most difference to older people's wellbeing. It highlights the key dimensions for older people's independence many of which cut across the responsibilities of many different local and national agencies. The main issues that form the foundations for a good quality of life for older people include good social relationships with family friends and neighbours, participation in social and voluntary activities, living in a good home and neighbourhood, and having a positive outlook. The role of the County Council is to bring partners and communities together to ensure that older residents of Leicestershire are Ageing Well in Leicestershire.

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Green Travel Plan
Report of:	Environmental Protection Group Manager
Status:	Public

1. Purpose of Report

- 1.1 To propose a Green Travel Plan for the Council to help reduce the environmental impact from the travel demands of the Council, thereby helping to improve our Carbon Footprint.

2.	<u>Recommendations</u>
2.1	To approve the Draft Green Travel Plan attached at Appendix 1 to this report for consultation with interested parties.
2.2	That delegated authority be granted to the Environmental Protection Group Manager in consultation with the Natural Environment Portfolio Holder to approve the Green Travel Plan, taking into account the responses to the consultation exercise.
3.	<u>Reason for Decisions Recommended</u>
3.1	The Council has an obligation to tackle Climate Change following the signing of the Nottingham Declaration. The implementation of a Green Travel Plan will reduce the Council's Carbon Footprint; this will be measured by National Indicator 185.

4. Forward Plan

- 4.1 10/08(051).

5. Key Decision

- 5.1 Yes.

6. Matters for Consideration

- 6.1 At Council on 14th October 2008 the Climate Change Action Plan was approved (minute 240 2008/2009 refers). One of the key actions within this is to develop and implement a Green Travel Plan for the Council to promote sustainable transport direct to individuals and businesses.

- 6.2 The proposed Green Travel Plan is provided at Appendix 1 and the specific aim is;
To minimise environmental impacts and the level of congestion locally, from Council staff commuting and travelling on business.
It is recognised that there is the need to balance the requirements of travel with quality of life and impact on the environment.
- 6.3 The Green Travel Plan sets out how the Council intends to work to tackle Green Travel issues by focussing on five key areas of action;
- **Car Sharing**
 - **Business Travel**
 - **Walking and Cycling**
 - **Public Transport**
 - **Fleet**
- 6.4 Each area contains a list of measures which is qualified by reference to timescale, delivery partner and outcome. This will help to ensure clarity and focus. While certain targets and goals can be achieved relatively quickly, progress will be reviewed on a regular basis.
- 6.5 The actions proposed are intended to benefit our local environment and the people that work and live in it. The Green Travel Plan aims to set the standard for the future to limit the effects of climate change, to raise awareness and declares the Council's intention to work in partnership with the local community to develop a more sustainable future for the district.
- 6.5 Progress will be measured annually by reviewing the document and supplemented and informed by biannual Staff Travel Surveys. This will ensure improvements are captured and performance can be evaluated.

7. Other Relevant Considerations

7.1 Legal Implications

- Fulfilment of statutory requirements and obligations of the LAA.

7.2 Nottingham Declaration and Climate Change

- This report sets out how the Council will fulfil the commitments made by signing the Nottingham Declaration and more specifically the Actions in our own Adopted Climate Change Action Plan.

8. Other Options Considered

- 8.1 None, the Council is committed to fulfilling the obligations of the Nottingham Declaration on Climate Change.

9. Appropriate Consultations

- 9.1 Planning Policy Team.
- 9.2 Human Resources.

9.3 Neighbourhood Services.

9.4 Asset Management.

9.5 Communications.

9.6 Web Development Team.

10. Financial and Efficiency Implications

10.1 The revenue and capital costs associated with implementing the measures incorporated within the Green Travel Plan are included in growth bids for next year (2009/10).

10.2 Expenditure is linked with the financial and energy implications detailed in the Climate Change Action Plan Council Report of 14th October 2008.

11. Appendix to this report

11.1 Appendix 1 – Green Travel Plan

12. List of Background Papers

12.1 Nottingham Declaration.

12.2 Blaby District Council Climate Change Action Plan.

12.3 Council Report “Recommendations of the Cabinet Executive- Climate Change Working Party Update” of 14th October 2008.

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- ✓ **Monitoring Officer** (Legal Services Manager)
- ✓ **Portfolio Holder (Cabinet Executive/Council reports only)**

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GREEN TRAVEL PLAN

DECEMBER 2008

Contents

- 1.0 Introduction
- 1.1 Background Information
- 1.2 What is a Travel Plan?
- 1.3 Why do we need a Travel Plan?
- 2.0 Current Employee Travel Plan Behaviour
- 2.1 Travel Survey general information
- 2.2 Travel Survey findings August 2008
- 3.0 Aims of Blaby District Council Travel Plan
- 3.1 Main Objectives
- 3.2 Achievements so far
- 4.0 Travel Plan Actions
- 4.1 Car Sharing
- 4.2 Business Travel
- 4.3 Walking and Cycling
- 4.4 Public Transport
- 4.5 Fleet Vehicles, including the Depot, Essential, Casual and Lease Car Users
- 5.0 Travel Plan Promotion
- 6.0 Definitions
- 7.0 Contact Details for further information

December 2008

1.1 Background Information

Blaby District Council employs in excess of 350 individuals in many offices throughout the district. These include the Main Offices in Narborough, Littlethorpe Depot, Blaby Outreach Office and the Pavilion.

The main Offices in Narborough are located in a suburban semi-rural location. It is approximately 6 miles South of Leicester City Centre and lies close to J21 of the M1 and the M69 motorways. It is in close proximity to Carlton Park, Fosse Shopping Park and Grove Park.

There is no on-site restaurant at the Council offices, however a sandwich van visits the site daily, and there are restaurants and sandwich shops within walking distance from the main offices. There is also a cash machine, banking facilities, and a few small shops which help to reduce lunchtime travel needs. There are walks available due to the location of the site, for individuals who wish to get out of their offices at lunchtime. In addition there is a Local Authority owned leisure facility available, however this is not within walking distance of the main Council office site.

At the main Council offices, there is a high demand for parking spaces, and in the future, demand for parking spaces at the site is anticipated to increase, due to extra people being located at the main site.

A Travel Plan is essential for Blaby District Council, not only to reduce the number of vehicles at the site at any given time, but also to align to goals set in the Sustainable Community Strategy 2008 and Corporate Plan 2008-2011, and as part of our commitment to reducing the Council's Carbon dioxide emissions through actions set out in the Climate Change Action Plan, which was adopted on 14th October 2008 by the Council.

This document will be led by the Environmental Protection Group.

1.2 What is a Green Travel Plan?

A Green Travel Plan is a package of measures produced by employers, which can encourage and educate staff, to use alternative modes of transport other than the single-occupancy car use. This covers travel both to and from work, and during the day for meetings etc.

There are several essential objectives required of a Green Travel Plan;

- 1) To reduce the environmental impact from travel demands of the Council and reduce business travel, thereby reducing our carbon emissions.
- 2) Raise travel awareness of employees and the impact their individual decisions can have on their local environment.
- 3) Help reduce local road congestion and therefore improve air quality, particularly in the areas where there are Air Quality Management Areas.
- 4) Achieve a balance between business needs, staff needs and local community issues.

A Green Travel Plan can offer real benefits both to the organisation, its employees and to the communities surrounding the area. It can help to alleviate local parking and congestion problems and improve public transport connections across the area. It may also reduce the stress suffered by employees through sitting out long delays or experiencing lack of parking once arrived at work. Green Travel Plans can also provide the opportunity to cut staff travel commitments and their own and the Councils carbon footprint by working from home on occasions.

Green Travel Plans raise awareness of the consequences of travel choice and the benefits of choosing suitable alternatives, as well as minimising the impact of travel on the environment.

Blaby District Council are developing a programme to improve the health and wellbeing of its staff, through the Countywide Health and Wellbeing Award. A Green Travel Plan can help individuals improve this area of their life by improving an individual's fitness and as a side affect improve local air quality. This can potentially be achieved by reducing unnecessary travel and encouraging those who have to travel to do so in the least environmentally damaging way. As Blaby District Council has five Air Quality Management Areas within the District, the air quality may benefit from the Council adopting and implementing a Green Travel Plan.

Green Travel Plans can reduce the cost of the Councils essential, casual and lease car fleet by cutting mileage claims and other business travel costs. In addition, the fuel efficiency of the Depot fleet can be improved.

This Green Travel Plan is an evolving document, which will grow and develop alongside the transport and planning needs, and changing circumstances of Blaby District Council.

December 2008

1.3 Why do we need a Green Travel Plan?

The Council implements a range of measures to ensure that Green Travel Plans are submitted for certain developments. These developments, are over a certain specified size, and may have a significant impact on the local area. In addition, the Draft Core Strategy (Preferred Options) April 2006 for the Local Development Framework (LDF) stated 'The Council will through its LDF support initiatives that encourage people not to use cars and provide community benefits' and under CS12 (i) Sustainable transport, it states that ' New development should meet the transportation needs of people and goods in a sustainable manner, New developments should: Attempt to minimise the need to travel; Where travel is necessary, maximise safe easy access to and from homes, jobs, leisure and other facilities using a range of modes of transport, with preference given to walking, cycling and public transport. New developments should not rely solely on the use of private motor vehicles.

The Council is currently experiencing issues with parking at its main site, where there are now more vehicles than car parking spaces available. The Council encourages other businesses around the District to create Green Travel Plans, and therefore it would be good practice for the Council to have its own Green Travel Plan. The Council recognises that although travel is essential for many of its services, it is also recognised that travel has negative impacts on the local and global environment and therefore has a responsibility to minimise this impact.

The Council held a TravelWise event for the larger businesses around the District in January 2008. In July 2008, the Council carried out a Staff Travel Survey with all employees. This identified areas to be considered as part of a Green Travel Plan.

2.0 Employee Travel Behaviour

2.1 Travel Survey general information

Blaby District Council carried out a Staff Travel Survey between Tuesday 1st July and Friday 1st August 2008. The survey was mainly completed on line by members of staff, with approximately 80 more printed to be filled out by staff without access to the council's intranet. Of the total number of staff surveyed, responses totalled 199, this represents a response rate of 55%, which is above average for a survey of this nature. However it is accepted that the accuracy of figures and targets is linked to the responses received and will not necessarily reflect the opinion of all staff.

2.2 Travel Survey findings August 2008

The following table indicates the modes of transport used by staff members in getting to work.

Mode of transport used	% of staff members
Car (Single Occupant)	74.5
Car (As a Passenger)	6.0
Car (Driver with Passengers)	5.0
Scooter/Moped/ Motorcycle	0.5
Bus	1.0
Bicycle	4.5
Walk	4.0
Train	1.5
Taxi	1.0
Other	2.0

The results show that 74.4% of staff who responded to the survey travel to work in a car as a single occupant. The percentages of all other modes used to travel to and from work are small in comparison to the number of single occupancy car trips.

The mode of transport used to travel to work was mapped using the home location of those who responded. It was evident that there are several key corridors to the main Council Offices where there are clusters of single occupancy drivers. The introduction of a car share scheme could help to find some of these drivers' car share partners, which will reduce the number of vehicles travelling to the Council Offices.

The distance travelled to work was requested in the Survey, this was based on the distance from BDC main Offices. A large cluster (102 people/ 48% of people

December 2008

who responded to the survey) of employees are located within a 5 mile radius of the Council Offices and the most common form of travel is shown to be single occupancy travel. A large number of these could be considered to be within a reasonable distance of the Council Offices to consider using other modes of travel.

It is known that car use is not always the most cost effective or efficient option. Alternative transport can be cheaper, faster and allow additional productive time (particularly on long journeys).

When analysing the results of the Staff Travel Survey it was noted that 36% of Staff do not need to use their cars during the working day.

An analysis was undertaken on trips that were made by employees during the course of a working week for business purposes, and the mode of travel used to make these trips. It was found that 52% of respondents needed to leave their place of work on business during a normal working week. Over 100 of the respondents stated that they made this trip on their own in their own vehicle.

3.0 Aim

The aim of the Green Travel Plan is *to minimise environmental impacts, and the level of congestion locally, from Council staff commuting and travelling on business.*

It is recognised that in order to provide a cost effective and efficient service, some staff need the personal use of a car or Council vehicle (essential users), and this is taken into consideration.

3.1 Objectives

- 1) Reduce environmental, social and business impacts associated with transport use, by reducing the number of, unnecessary journeys made to and from different sites from single occupancy vehicles.
- 2) Reduce total emissions generated by staff travel.
- 3) Promote more methods of sustainable transport and raise awareness of alternative travel choices.
- 4) Set an example and promote best practice to other businesses within the District.
- 5) Reduce the environmental impacts of the Council's fleet, and integrate this within the Climate Change Action Plan.
- 6) Work with key partners and stakeholders to encourage take up of any scheme.

3.2 Achievements so far

- Shower and changing facilities available for individuals in the civic suite main office and depot areas.
- Lockers available for walkers and cyclists in the civic suite, main office and depot areas.
- Bike shelter available for cyclists.
- Lease car scheme has been re-evaluated to encourage the use of vehicles with lower CO₂ emission levels.
- Implementation of a home-working scheme.
- Health and Well Being Week held at the main offices and the depot in October 2008 to improve the Health and Wellbeing of Council Employees, and to raise awareness.
- District bus timetables are available in reception for the public and employees.

December 2008

- Reimbursement of prior purchase of train tickets available for employees attending external meetings or training.
- Promotional event held for electronically powered bicycles.
- Flexi time available.

DRAFT

4.0 Green Travel Plan Actions

To date, a number of measures have already been implemented, as can be seen in section 3.2. However the following section includes further actions which will build on the work already begun, on a phased basis, which will allow time for change and adjustment to new ideas.

4.1 Car Sharing

Car sharing allows people to enjoy the convenience of the car, whilst alleviating the associated problems of congestion and pollution, and in addition reducing the Councils carbon footprint. It also saves money, as sharing journeys shares fuel costs among more people. It has been stated that if everyone shared just one journey a week, traffic would be reduced to the levels seen during school holidays.

Car Sharing is an alternative for staff when cycling, walking, and public transport are not realistic options. It was concluded from the Staff Travel Survey that there was considerable scope for making a car sharing scheme extremely successful, both in terms of a positive reaction towards such a scheme, and also from the clusters of single occupancy car users who live along the key routes towards the main council buildings.

The Staff Travel Survey results indicate that 34% of people stated that guaranteed transport home would encourage them to join a car share scheme; therefore this must be a critical element of the scheme. 16% requested online access to a car share data base and 12% requested preferential guaranteed parking spaces for the service users.

The flexi time system may have an impact on the feasibility of any car sharing scheme, however this will be considered when the scheme is developed.

CAR SHARING

GREEN TRAVEL PLAN MEASURE	TIMESCALE	DELIVERY PARTNER	OUTCOME
Implement a car sharing scheme (the scheme should include; guaranteed ride home, priority parking spaces, including times and days)	●	HR EP AM C	Reduce the number of single occupancy cars travelling to the offices
Consider charging for parking spaces in the Staff Car Park when used by non car sharers.	●	EP AM C	Discourage single occupancy journeys, at Next priority spaces are available for car sharers before 9.30 and after this time are available for all to use.
Provide designated spaces in the car park for Car Sharers.	●	EP AM C	Encourage participation in the Car Sharing Scheme.

4.2 Business Travel









A large proportion of staff at Blaby Council are required to travel for business purposes, and most of these journeys are automatically made by car. 58% of respondents to the Staff Travel Survey indicated that they used their car for business while at work.

When carrying out work on business, all staff use the car, because they are unaware of alternatives available, and because they are paid an allowance for this purpose. There is a lack of consistency throughout the Council in terms of casual and essential car user status. A large number of individuals have to bring their cars into work as an essential user, but may not use it for the majority of the week. There are cases where essential users live close to one another but must both bring their cars into work as part of their essential car user requirements, rather than sharing a lift, even though they may not require their car that day. These issues must be addressed as it will free up parking spaces and reduce CO₂ emissions. The Green Travel Plan anticipates addressing this with a thorough review of car user status, and liaisons with HR to look at process user requirements and car parking arrangements.








The use of Pool cars could be encouraged where every staff member has access to a car should they need it throughout the day.

The recently revised Training Mileage Scheme actively encourages car sharing; there could be feasibility for a similar scheme for essential and casual car users.

BUSINESS TRAVEL

GREEN TRAVEL PLAN MEASURE	TIMESCALE	DELIVERY PARTNER	OUTCOME
Examine ways of encouraging staff to use public transport for business journeys.		C HL EP	Reduce the number of single occupancy car journeys made
Assess the feasibility of a scheme where essential and casual car users can claim mileage allowance using alternative means of transport.		HR EP F	Encourage transport to be used, other than cars
Encourage participation in and extend, if practicable the home working scheme.		HR EP ICT	Reduce the number of vehicles travelling to the Council offices
Review the essential and casual car user processes to allow for car sharing to take place on journeys to and from work.		HR EP F	Allow car sharing to take place
Complete a feasibility study to examine the possibility of providing a work bus for certain routes to work		HR EP F	Reduce number of unnecessary journeys to work
Introduce incentives for cyclists i.e. mileage claims		HR EP F	
Investigate the possibility of purchasing electric powered bikes, to be provided for short business journeys		AM EP HR	
Complete a pool car feasibility study.		EP F	Will link to the revision of

December 2008








			essential and casual car users
Explore the use and take up of teleconferencing		ICT EP	
Update fuel mileage claim forms to capture additional information –to enable calculation of CO ₂ emission levels.		EP F	
Improve awareness and availability of public transport information within all work locations		EP C WDT	Add links to the website and provide documents in reception
If charging for council staff car park is introduced, assess the use of differential rates to reflect green credentials for cars		F EP	
Encourage take up of the lease car scheme to improve the Councils carbon footprint through better maintained and lower carbon emission vehicles.		HR EP F	Encourage drivers to have newer more efficient cars with lower carbon dioxide emissions.
Examine the lease car scheme emission rates.		EP HR F	Encourage lower emission lease cars to be taken.
Consider the introduction of a scheme similar to that of training mileage for casual and essential users.		EP HR F	Encourage business journeys to be shared, providing an incentive.

December 2008

4.3 Walking and Cycling

Walking and Cycling are excellent ways to keep fit and for staff to incorporate exercise into their daily routine.

Cycling can improve lung capacity and improve fitness if done regularly.

GREEN TRAVEL PLAN MEASURE	TIMESCALE	DELIVERY PARTNER	OUTCOME
Improve the provision of cycle facilities		AM EP F	Allow for greater storage of bicycles on site
Improve the locker and shower facilities		AM EP	Encourages people to cycle
Assess the feasibility of a cycle loan / lease scheme and employee discounts with cycle retailers		HR EP F	
Provide a safety check for staff bringing a bicycle to work		CHS EP	
Implement a process for loans to be made available for the purchase of Electric bikes		EP F	Salary sacrifice scheme.
Provide personal alarms for staff who regularly walk to work		HR EP CHS	
Provide High Vis tabards for staff walking or cycling to work		HR EP CHS	

4.4 Public Transport

For many staff, walking or cycling to work may not be realistic. However public transport could provide a suitable alternative to the car. Many journeys (especially long ones) can be quicker, cheaper and less stressful on public transport, especially during rush hour, where special bus lanes allow the free passage of buses alongside queuing traffic. It is also possible to use a combination of public transport, cycling and walking. By using public transport, not only would staff be helping to ease congestion, they would also be reducing noise, air pollution and both their own and the Councils carbon footprint.

The main offices, Pavilion and depot are not particularly well served by buses, due to the out of town location. However there are a few services which run past the offices such as the service 50 and 50A. There are also a number of other cross-country buses for those wishing to travel around the District. However in recent years, losses to some of these services have occurred. All these services could be improved and awareness of those services that do exist to staff and the public will allow more people to gain the knowledge that these services do exist, and are accessible to all.

Results from the Staff Travel Survey indicate, 29% of people would be more likely to use public transport if discounted or lower bus fares were available. 11% asked for a more reliable train service, 9% asked for a more direct bus service. Therefore there is potential scope for improving the public transport services in and around the District through engaging with local operators and other local businesses that either have Green Travel Plans, or employ large numbers of individuals within the District.





PUBLIC TRANSPORT

GREEN TRAVEL PLAN MEASURE	TIMESCALE	DELIVERY PARTNER	OUTCOME
Engage with bus / train operators and Leicestershire County Council to re-examine bus routes / and reliability of specific services	●	EP Leicestershire County Council	
Negotiate and if appropriate, supply discounted tickets for staff (including cross network buses and trains)	●	HR EP F	
Complete a feasibility study to establish whether it would be more cost effective for staff to purchase annual tickets as opposed to paying for individual journeys.	●	F EP	
Examine the possibility of providing public transport season tickets subsidised by car park charges if introduced in the staff car parks	●	F EP	

4.5 Fleet Vehicles, including the Depot, Essential, Casual and Lease Car Users

Blaby District Council currently has 52 depot fleet vehicles, however the “grey fleet” which includes essential /lease /casual car users is considerably larger.

Through the Green Travel Plan, Energy Savings Trust Green Fleet Review, and the Climate Change Action Plan, the Council is now working to reduce the environmental impact of its fleet.

GREEN TRAVEL PLAN MEASURE	TIMESCALE	DELIVERY PARTNER	OUTCOME
Examine the feasibility of the use of fuel efficient vehicles such as hybrid or dual fuel vehicles		EP	
Trial a telematic system with the Depot vehicles to monitor journey length and fuel consumption		EP NS	10 vehicles currently being used
Undertake a study to examine the feasibility of Compressed Natural Gas as fuel for the Depot fleet vehicles		CHS F EP NS	Discussions currently taking place with a supplier
Implement a robust data capture system for all fleet to capture more relevant and useable data from the essential and casual users		NS EP	

5.0 Green Travel Plan Promotion

The Staff Travel Survey had a good response rate of 55%. After actions have been put in place to encourage staff to use alternative methods of transport, and the Green Travel Plan has had time to become effective, it would be prudent to complete a further survey in the future to see if staff realise and understand new policies and procedures, and to check on their implementation. This is proposed for 2010.

Effective promotion and marketing of the Green Travel Plan is essential as it relies on behavioural changes. This in turn will bring about increased success. All staff need to be aware of the Green Travel Plan, its policies and how it will affect them.

A number of methods can be used for promotion including staff weekly meeting sessions, the intranet, team briefs, posters and leaflets. External awareness could be raised through our web site.




GREEN TRAVEL PLAN PROMOTION

GREEN TRAVEL PLAN MEASURE	TIMESCALE	DELIVERY PARTNER	OUTCOME
Consider offering personal journey planners for public transport (i.e. add links to the website)	●	C WDT	Add information to BDC website and ISIS
Consider offering personal journey planners for business trips (i.e. add links to the website)	●	C WDT	Add information to BDC website and ISIS
Complete a follow up Staff Travel Survey	Bi- annual (2010)	EP WDT	Check implementation and effectiveness of Green Travel Plan
Introduce the Green Travel Plan to staff at their induction	●	HR	Section to be added to corporate induction packs
Promote Bike Week each year	Annually (2009)	HL C EP	Encourage staff to use alternative methods of transport
Develop Green Travel Plan web page for ISIS and introduce feedback page	●	WDT EP	Allow for comments, suggestions and constructive criticism.

December 2008

6.0 Definitions

Timescales are defined as follows

Short Term 	Medium Term 	Long Term 
Zero to six months	Six to twelve months	Twelve to 18 months

Delivery Partners are defined as follows

EP	Environmental Protection
HR	Human Resources
AM	Asset Management
WDT	Web Development Team
PP	Planning Policy
NS	Neighbourhood Services
C	Communications
F	Finance
HL	Health and Leisure
CHS	Corporate Health and Safety
ICT	ICT

7.0 Contact Details

For further information please contact

Jon Wells	Environmental Protection Group Manager
Anna Hocken	Environmental Strategy Officer
Louisa Nadolny	Environmental Strategy Assistant

December 2008

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Car Parking Arrangements in Narborough
Report of:	Director of Operations and Environmental Protection Group Manager
Status:	Public

1. Purpose of Report

- 1.1 To propose a Project Plan for implementing the Car Parking Management proposals approved by Council on 14 October 2008 (minute 239:2008/2009 refers) in Narborough.

2.	<u>Recommendation</u>
2.1	To approve the Project Plan attached to this report Appendix 1 to permit the introduction of charges as approved by Council on 14 October 2008 (minute 239: 2008/2009 refers) on Weavers Court and the Station car parks in Narborough on 01 February 2009 (subject to legal process and work programme for Leicestershire County Council displacement controls).
3.	<u>Reason for Decision Recommended</u>
3.1	Council approved the proposals and schedule of charges for the public car parks within the District of Blaby subject to the approval of a full Project Plan.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 11/08 (060).

5. Key Decision

- 5.1 Yes.

6. Matters for Consideration

- 6.1 The Council's Car Parking Management proposals were approved by Council on 14 October 2008 (minute 239: 2008/2009 refers).
- 6.2 In Narborough there are four public car parks currently providing 98 spaces located at Weavers Court, Leicester Road, the Station and the Grange. The Council has approved the introduction of the following charges for the periods from 8.00am to 6.00pm, Monday to Saturday:

- **Weavers Court:**

	Up to 2 hours	Free
	Up to 3 hours	£1.00
	Up to 4 hours	£2.50
	Over 4 hours	£4.50
Season tickets	£395 per annum	
Residents Parking Permits	£50 per annum	

- **Station Car Park:**

	All day	£3.75
	Season tickets	£395 per annum

- **Leicester Road:**

The car park will remain free but the maximum stay will increase from 1 to 2 hours.

- **The Grange:**

The car park will remain free for a maximum of 1 hour.

6.3 At Cabinet Executive on 28 July 2006 (minute 153: 2006/2007 refers) when earlier consideration was given to the introduction of car park charges the following recommendation was made:

(1) That there should be no action on implementing the proposed charging regime for car parks in Blaby town centre and at Enderby Leisure Centre in the short to medium term until the impact of the introduction of Decriminalised Parking Enforcement (DPE) has been carefully considered and analysed and

(2) That the Council should actively pursue improvements at Narborough Station car park including the introduction of charges at that site.

This established the basis that the implementation of the car parking proposals and schedule of charges (outlined in the Council report of 14 October 2008) could be introduced in Narborough without dependency on the situation elsewhere within the district.

6.4 The £200,000 project to redevelop and extend the car park at the Station commenced on 8 September 2008 and although the work programme has slipped slightly (following protracted negotiations with Network Rail relating to the lease) it is still scheduled for completion by early January 2009. The completion of this project will create an additional 36 long term spaces for commuters and is key to the implementation of the management proposals within Narborough. Further, it is also recognised that any improvements to the Station car park will need to coincide with measures to control parking at Weavers Court car park and on street displacement controls within

Narborough and Littlethorpe villages.

- 6.5 The Project Plan provided at Appendix 1 details the work required along with appropriate timescales before charges can be introduced.

7. Other Relevant Considerations

7.1 Legal Implications

The Road Traffic Regulation Act 1984 and The Local Authorities' Traffic Orders (Procedure) (England and Wales) Regulations 1996, outline the manner in which Parking Orders may be made.

7.2 Nottingham Declaration and Climate Change

The introduction of charges will support the Council's ambition of promoting the use of sustainable transport. The provision of secure cycle facilities on car parks will also encourage sustainable travel.

7.3 Crime & Disorder

Improved lighting, patrolling, secure facilities for bikes and CCTV will help to reduce crime on car parks.

7.4 Risk Assessment

The Council is facing severe financial pressures arising from grant funding levels and efficiency targets from Government announced in CSR07. It is imperative that the Council looks for all opportunities to reduce expenditure and generate additional income if the Council is to be able to deliver its priority objectives.

Implementing charges for car parks which have previously been free for users may result in behavioural change which could be counter productive to other aspects of the Councils corporate ambitions. This aspect will be closely monitored and subject to formal review after six months.

In the PricewaterhouseCoopers VAT Bulletin dated 16 September 2008, there maybe a liability going forward for VAT on any car park charges.

8. Other Options Considered

- 8.1 None – the approval of a Project Plan by Cabinet Executive is part of the recommendation made by Council.

9. Appropriate Consultations

- 9.1 Leicestershire County Council.
9.2 Network Rail.
9.3 East Midlands Trains.

10. Financial and Efficiency Implications

- 10.1 These are detailed at Appendix 2 of this report.
- 10.2 Revenue income is predicted to substantially reduce the current burden on the charge payer. The works relating to the Station car park are funded by a grant from the East Midlands Development Agency (EMDA).

11. Appendices to this report

- 11.1 Appendix 1 – Project Plan for Narborough.
- 11.2 Appendix 2 – Financial and Efficiency Implications.

12. List of Background Papers

- 12.1 BDC – Car Parking Strategy.
- 12.2 Cabinet Executive reports of 28 July 2006, 31 January 2008 and 6 October 2008.
- 12.3 Council reports of 10 July 2007, 26 February 2008 and 14 October 2008.
- 12.4 Legal – The Traffic Regulation Orders covering car parks in the District of Blaby. The lease relating to land on Station Road, Narborough. Traffic Management Act 2004.
- 12.5 Surveys – The report from RTA Associates, on the survey conducted on instructions from the Council, of usage of car parks within the District (2004), revised 2007/08. Public consultation survey carried out in 2005/06 on the implementation of the Car Park Strategy.
- 12.6 PricewaterhouseCoopers VAT Bulletin dated 16 September 2008.

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- ✓ **Monitoring Officer** (Legal Services Manager)
- ✓ **Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

PROJECT PLAN FOR NARBOROUGH

Advertise the District of Blaby (Off Street Parking Places) Replacement Order 2008	Week commencing 10 November 2008
Meeting with the Leicestershire County Council (LCC) to agree and identify displacement controls for Narborough/Littlethorpe	13 November 2008
Award work for Phase 3 of the Station Car Park redevelopment including the CCTV, cycle shelters, pay and display machines, lighting, landscaping and signs. Order pay and display machines, a cycle stand and signage for use on Weavers Court Car Park.	November 2008
LCC to commence the statutory process for the introduction of displacement controls in the Narborough/Littlethorpe area	November/December 2008
Complete Phase 2 of the Station Car Park redevelopment (Network Rail land)	November/December 2008
Commence Phase 3 of the Station Car Park Project	November/December 2008
Undertake an assessment of the lighting systems and requirements for CCTV within the Weavers Court Car Park and establish a schedule of work to meet the ACPO Park Mark Status. Prepare a schedule and award the work.	December 2008
Establish a procedure for the production and issuing of season tickets, residents parking permits and Smart cards to include identification of outlets, database and operating protocol. Establish and set up communication channels.	December 2008
Agree a differential charging policy (disabled users, motor cycles, payment options, 'green' vehicles, monthly season tickets etc).	December 2008
Carry out any lighting and CCTV work at Weavers Court Car Park	December 2008/January 2009
Mark out disabled bays on Weavers Court	December 2008/January 2009
Make provision for and install litter bins on Weavers Court and the Station car parks	December 2008/January 2009
Advertise the introduction of the District of Blaby (Off Street Parking Places) Replacement Order 2008	December 2008/January 2009

Place an order for the provision of tickets for use in the pay and display machines. Examine the possibility of advertising to reduce the cost.	December 2008/January 2009
Advertise and approval of LCC displacement controls	January 2009 *
Set out and agree a maintenance schedule for Weavers Court and the Station car parks (sweeping, CCTV and lighting maintenance, litter picking, landscape maintenance etc.)	January 2009
Introduction of LCC displacement controls – road markings, signage etc. in the Narborough/Littlethorpe area.	31 January 2009 *
Complete the Station Car Park redevelopment	31 January 2009
Introduction of charging in Narborough	1 February 2009 *

* - Subject to legal process and Member approval for LCC displacement controls

FINANCE AND EFFICIENCY IMPLICATIONS FOR NARBOROUGH (based on full year)

Revenue Income

Residents Parking Permits	500
Income from charges	51,450
Sponsorship/advertising on tickets	3,000
Total	(£54,950)

Revenue Expenditure

Current revenue expenditure (2008/09)	135,000
Maintenance and insurance of pay and display machines	1,400
Cost of tickets	4,500
Cash collection	3,000
Maintenance and insurance of CCTV	1,600
CCTV monitoring	1,800
Maintenance of lighting	400
Additional electricity	400
ACPO registration	400
Revenue cost for funding capital	6,000
Total	£154,500

Capital

2 pay and display machines	6,000
Signage	3,500
Off Street Parking Places Order changes	7,500
ACPO assessments/establishment	400
CCTV and lighting	10,000
Cycle provision	500
Total	£27,900

Balance

Income	(£54,950)
Expenditure	£154,500
Balance	£99,550

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Access to Information Policy and Draft Publication Scheme under Freedom of Information
Report of:	Legal Services Manager
Status:	Public

1. Purpose of Report

- 1.1 To update members on the steps taken by the Council to ensure compliance with the Freedom of Information Act 2000, the Environmental Information Regulations 2005 and the Data Protection Act 1998, and to seek approval and adoption of the Access to Information Policy. Also attached for information at appendix 2 is the revised Freedom of Information Publication scheme, which the Council has a statutory obligation to review before January 2009.

2.	<u>Recommendations</u>
2.1	That Cabinet Executive approve and adopt the Access to Information Policy appended. The policy replaces with immediate effect, the previous Data Protection and Freedom of Information Policies which were adopted by Cabinet on 30 April 2004.
2.2	That Cabinet note the revised Freedom of Information Publication Scheme.
3.	<u>Reasons for Decisions Recommended</u>
3.1	The Council is required to ensure that it maintains full compliance with the aforementioned pieces of legislation. Since the last policies were adopted in 2004 it is appropriate to review and update the Council's policies and alterations have been made to reflect changes in the legislation.
3.2	As these pieces of legislation fit very closely together it is considered appropriate to combine them in one policy document.
3.3	The Council has a statutory obligation to publish and maintain a publication scheme, this has to be produced using a template provided by the Information Commissioners Office.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 07/08(029).

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 The Access to Information Policy combines, updates and replaces the separate Data Protection and Freedom of Information policies which were adopted by Cabinet on the 30 April 2004, and incorporates the requirements of the Environmental Information Regulations 2005 to provide one overarching policy.

6.2 This policy is supplemented by further guidance produced for staff by the Legal Services section on the procedure for dealing with requests, the Council also has an in house IT training package covering Freedom of Information and Data Protection.

6.3 To date the Council has not received any complaints to the Information Commissioners Office (the office responsible for ensuring compliance with these areas of legislation) and having a robust policy and procedure framework in place for handling access to information is vital to maintain this status.

6.4 The Council is required to publish and maintain a Publication Scheme under the Freedom of Information Act. The Information Commissioners Office have now provided all authorities with a template covering the classes of information that should be included and the Council must adhere to this template.

7. Other Relevant Considerations

7.1 Legal Implications

The Council must comply with the requirements of the Data Protection Act 1998, Freedom of Information Act 2000 and the Environmental Information Regulations 2005 therefore it is necessary to have a policy in place.

8. Other Options Considered

8.1 None – the Council must have in place a framework for responding to requests for information and also a policy and procedure for handling personal data.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 None.

11. Appendices to this report

- 11.1 Appendix 1 – Access to Information Policy.
- 11.2 Appendix 2 - Freedom of Information Publication Scheme.

12. List of Background Papers

- 12.1 Data Protection Act 1998.
- 12.2 Freedom of Information Act 2000.
- 12.3 Environmental information Regulations 2005.

The following Officers/Members have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder (Cabinet Executive/Council reports only)

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Access to Information Policy

Our commitment to sharing Information

Author: Sara Jane Owens
Department: Legal Services
Reviewed: October 2008
Version: 1.0

Policy Statement

The Council will ensure that:

- 1.1 It has appropriate procedures and processes in place to manage the requirements of the Freedom of Information Act 2000, Environmental Information Regulations 2004 and the Data Protection Act 1998.
- 1.2 It monitors and reviews its Freedom of Information, Environmental Information and Data Protection request handling processes periodically and ensures that procedures for handling requests are communicated to staff effectively.
- 1.3 Information shall only be withheld if a legitimate exemption or exception applies and that in such cases the application of the exemption will be explained to the customer.
- 1.4 It implements and maintains the Freedom of Information Publication Scheme.
- 1.5 It maintains a principle of openness in relation to contracts & tendering, and ensures that confidentiality clauses are drafted to reflect this, and used only in limited circumstances.
- 1.6 All staff are aware of their responsibilities under the Acts' and Regulations and training is provided.
- 1.7 A publication scheme and request coordinator is appointed.
- 1.8 It provides as much information as is practicable in electronic format, to assist requesters.
- 1.9 Advice and assistance will be offered to help customers make requests and the progress of their requests, including the reasons for any delays, will be communicated to them.
- 1.10 It processes all personal data securely and has appropriate security measures in place when providing information to other bodies.

Purpose of the Policy

The purpose of this policy is to ensure that the provisions of the Freedom of Information Act 2000 (FOI), the Environmental Information Regulations 2004 (EIRs) and the Data Protection Act 1998 (DPA) are complied with. This policy replaces the previous Freedom of Information and Data Protection policies which were adopted in 2004.

This policy supports the legislative framework for responding to requests for information under these statutory access regimes and promotes the presumption in favour of disclosure of information to the public, wherever possible, to ensure a transparent, open and accountable Council.

This policy applies to all employees of the Council, including elected members, contract, agency and other temporary staff, volunteers and employees of partner organisations working for the Council and any other related third party organisations. It is the responsibility of managers to ensure that these groups are made aware of them and any subsequent guidance that is issued.

Requests for Information

Any person anywhere may request information under the Freedom of Information Act (FOI), Environmental Information Regulations (EIRs) or the Data Protection Act (DPA) and they do not have to specify for what purpose they are requesting the information.

All requests will be co-ordinated and responded to centrally by Legal Services, with the information being provided within the statutory timeframes be the relevant departments.

- Requests under FOI must be in writing, giving a name and correspondence address plus a description of the information sought. A response must be provided by the Council within 20 working days,
- Requests under the EIR's do not have to be in writing, however a name and address for correspondence will still need to be provided. The Council will encourage written requests wherever possible as this can help clarify the information sought. A response must be provided within 20 working days, although extensions of this time may be applied in limited circumstances.
- Requests under the DPA must be in writing and the requester must specify the information they believe the Council is processing as well as being required to pay a statutory £10 fee. The Council has developed a form to help customers frame their requests. A response must be provided within 40 calendar days.

The Council will provide any necessary advice and assistance to those making requests and will, wherever practicable, make information available in the format requested.

Copyright

The supply of information under the Freedom of Information Act and the Environmental Information Regulations does not give the person or organisation who receives it an automatic right to re-use the information in a way which would infringe copyright.

Any information which is supplied by the Council in response to a request will continue to be protected by copyright law. In most cases, copyright will belong to Blaby District Council, although copyright may belong to other organisations or individuals.

In some cases, Blaby District Council may have to provide information in response to a request where the copyright of the information is owned by another organisation or individual. If FOI or the EIRs requires the Council to release the information, any copying or reproduction which the Council has to do, will not infringe copyright. However, the person who receives the information is likely to need the permission of the copyright owner should they wish to re-use the information.

Fees and Charges

The Council aims to provide as much information free of charge on the website for customers to download or view at home. The Council will not therefore charge for requests for information, unless there is a charge set out in the Council's publication scheme or schedule of charges.

The Council may charge for the cost of disbursements such as photocopying and postage.

The Freedom of Information Act imposes a statutory limit on the amount that can be spent on locating and extracting the information required to answer a request. This limit is currently set at £450, which the legislation says is equivalent to 18 hours of staff time.

When estimating the cost of complying with a request for information, the Council may take into account the staff time reasonably incurred, when involved in the following activities:

- determining whether we hold the information,
- locating the information or a document which may contain the information,
- retrieving the information, or document that may contain the information, and
- extracting the information from a document containing it.

Actions which the Council may then consider taking when the estimated cost of complying with a request has been determined:

1. Request less than £450 (<18hrs)
 - The Council must respond to request.
2. Request between £450-£1000 (18-40hrs)
 - FOIA – the Council will refuse all requests.
 - EIRs – the Council can refuse the request if it is formulated in too general a manner or is manifestly unreasonable or we have reason to believe that the requests are cumulative or campaign requests.
3. Request greater than £1000 (>40Hrs)
 - FOIA – the Council will refuse all requests.
 - EIRs – the Council will refuse all requests as being formulated in too general a manner or manifestly unreasonable or where the Council has reason to believe that the requests are cumulative or campaign requests.

There is a presumption in all cases that the Council will offer advice and assistance to help the customer refine or narrow down their request.

Data Protection requests carry a statutory £10 charge.

Complaints

Any person who is unhappy with the way in which the Council has dealt with their request for information has been handled may ask for the matter to be reviewed, and all complaints should be in writing to:

Legal Services
Blaby District Council
Council Offices
Desford Road
Narborough
Leicester
LE19 2EP

Should the requester still be unhappy with the outcome of this review they have the right to pursue their complaint to the Information Commissioners Office:

Information Commissioners Office
Wycliffe House
Water Lane
Wilmslow
Cheshire

Background to the Access Regimes

What is the Freedom of Information Act (FOI)?

The Freedom of Information Act 2000 received Royal Assent on the 30th November 2000. The Act gives the public a general right to all types of information held by public authorities, and puts in place requirements for public authorities to disclose information where no exemptions apply. The Act also requires the Council to produce and maintain a publication scheme.

The Act came in to force on the 1st January 2005 and from this date anyone has been able to make a request for information. Requests must be in written format, email and fax are acceptable.

Key points under the Act are:-

- § that the enquirer has the right to be told whether the information exists
- § and that the information requested (subject to any exemptions) be released within 20 working days and where possible in the manner requested.

A person may request any information under the Act however there are a number of exemptions these being known as qualified (requiring a public interest test) and absolute exemptions (no test required)

Absolute exemptions include environmental information which is handled by the Environmental Information Regulations and personal data which is handled by the Data Protection Act 1998.

What is a Publication Scheme?

The publication scheme is a complete guide to the information routinely published by the Council. The scheme is not aimed to be a comprehensive list of actual publications (although many are included) since this will change over time, rather it is a guide to the information the Council holds.

In order to show this, the information is set in classes. Classes have been defined by the Information Commissioners Office to cover broad areas within which the Councils roles and responsibilities are listed.

Some classes of information will include elements required by existing legislation. All publications and information will be accessible unless they carry an exemption. Reasons for exemptions will be clearly indicated and can be challenged by contacting the scheme co-ordinator.

What are the Environmental Information Regulations (EIR's) ?

The Environmental information Regulations 2004 (“the regulations”) came in to force on the 1st January 2005. The aim of the regulations is to make bodies more open and accountable in relation to the environmental information that is held by them.

As with Freedom of Information requests should be responded to within 20 working days, however unlike FOI requests do not have to be in writing and so verbal requests must also be actioned.

The information specifically covered by the regulations is:

1. The state of the elements of the environment, such as air and atmosphere, water, soil, land, landscape and natural sites including wetlands, coastal and marine areas, biological diversity and its components. Including genetically modified organisms and the interaction among these elements.
2. Factors, such as substances, energy, noise, radiation or waste, including radioactive waste, emissions, discharges and other releases into the environment, affecting or likely to affect the elements of the environment referred to in 1.
3. Measures (including administrative measures), such as policies, legislation, plans, programmes, environmental agreements, and activities affecting or likely to affect the state of the elements and factors referred to above, and as well as measures or activities designed to protect those elements.
4. Reports on the implementation of environmental legislation.
5. Cost-benefit and other economic analyses and assumptions used within the framework of the measures and activities referred to above, and.
6. The state of human health and safety, including the contamination of the food chain, where relevant, conditions of human life, cultural sites and built structures in as much as they are or may be affected by the state of the elements of the environment or, through those elements by any factors or measures referred to above.

What is the Data Protection Act (DPA)?

There has been Data Protection legislation since 1984 with the most recent Act coming in to force in 1998.

The purpose of the Act is to protect the rights of the individual about whom data is obtained, stored, processed or supplied rather than those of the people or organisations who control and use personal data. The Act applies to both computerised and paper records.

The Act requires that appropriate security measures will be taken against unauthorised access to, or alteration, disclosure or destruction of personal data and against accidental loss or destruction of personal data.

Principles of Data Protection

The Act is based on eight principles stating that data must be:

Fairly and lawfully processed
Processed for limited purposes
Adequate, relevant and not excessive
Accurate
Not kept longer than necessary
Processed in accordance with the data subjects rights
Secure
Not transferred to other countries without adequate protection

Sensitive information is given further protection in addition to the above.

Disclosure and Data Security

The Council will normally only disclose information to third parties, other authorities or bodies with the data subject's approval, or where there is a statutory or legal obligation to do so.

The Council recognises that simply because information regarding services or residents is held within one department, it does not give a general or automatic right of access to other departments. Information may only be reused if it is compatible with the reason for which it was originally gathered. Data may be disclosed without the consent of the Data Subject only in specific and limited circumstances. These are as follows:-

- On production of court order.
- Where the purpose of disclosure is to enable the authority to assess or collect taxes and duties.
- Where the disclosure would lead to the prevention or detection of a crime, the apprehension or prosecution of offenders.
- Where the Council is obliged by law.
- By order of the Secretary of State.
- For matters of national security.
- To provide generalised or anonymised information for research

purposes.

- To Elected Members –
 - as part of their role as a committee member,
 - whilst acting at the request of a constituent (in respect of information about that constituent and not others)
- Where the disclosure is in the legitimate interests of the Council (e.g. disclosure to staff - personal information can be disclosed to other Council employees if it is clear that those members of staff require the information to enable them to perform their jobs or statutory duties.)
- For the performance of a contract.

As a Local Authority, the Council is required by many Government Departments and other bodies to make statutory returns of information to them for auditing and other purposes. The Council requires that all data is transmitted or transported in an appropriately secure manner.

In most cases it is the receiving body which stipulates the manner in which data is sent to them, however recent cases have shown that as the data provider the Council is still responsible for any data sent and will be liable if the data goes astray, particularly if no attempt to protect the data is made.

The Council requires that all data when transmitted or transported is done in an appropriately secure manner and applies encryption, password protection and tracked delivery of all data sent from the Council.



Freedom of Information Publication Scheme

Introduction

Blaby District Council lies in the heart of Leicestershire, situated to the south of Leicester City.

The Council covers a mainly rural district with the main areas of population being Blaby, Braunstone Town, Enderby, Narborough, Whetstone, Glen Parva and Glenfield.

The Council provides a wide range of services to the public including Health and Leisure, Community Safety, Development Control and Building Control.

The Council collects Council Tax and provides Council Tax and Housing Benefit.

The Council enforces Public Health and Environmental legislation.

It maintains the Local Land Charges Register and handles Local searches.

It is responsible for waste collection and disposal and it undertakes maintenance of open spaces and parks.

The Council does not provide the following services:-

Social Services

Education

Libraries and Museums

Please note that the Council is transferring its Housing Stock to a registered social landlord (Three Oaks Homes part of East Midlands Housing) and therefore only homelessness and private sector housing services will remain with the Council.

What is a Publication Scheme?

The purpose of the publication scheme is to provide a guide to the information the Council publishes or intends to public in the future.

Blaby District Council is required under the Freedom of Information Act 2000, to maintain a publication scheme and this scheme has been produced following the updated guidance provided by the Information Commissioner, and follows the approved standard.

In order to help you find the information you require the scheme is separated in to 7 broad headings these being:

Who are we and what do we do	Our Policies and Procedures
What we spend and how we spend it	Lists and Registers
What our priorities are and how we are doing	Services Provided by the Council
How we make decisions	

Wherever possible the information will be made available on the Council website, and you can search for it via www.blaby.gov.uk, however providing information electronically is not always possible and where this is the case you should request the information in writing (using the council form which is available online or on request, or via email or letter).

What information am I entitled to?

Anyone anywhere can request any information held by the Council whether it is listed in the publication scheme or not. However some information held by the Council may be exempt as defined by the Freedom of Information Act 2000 or subject to an exception as defined by the Environmental Information Regulations 2004.

Exemptions under the Freedom of Information Act 2000 can be absolute or qualified.

An absolute exemption means that the exempt information will not normally be made available to you at all. A qualified exemption means that the information will be made available to you, unless the public interest in not disclosing it outweighs the public interest in disclosure. This means that the Council will have to consider and decide where the public interest is greater.

Some of the absolute exemptions include information:-

- Which is accessible by other means
- Which relates to national security
- Which is or relates to court records
- Which is personal data protected under the Data Protection Act
- Which is subject to legal professional privilege

Qualified exemptions include information:-

- Which relates to investigations and proceedings
- Which relates to law enforcement
- Which relates to health and safety
- Which is commercially confidential

Can I use the information supplied to me for any purpose?

The simple answer to this is No. Information which is supplied to you under the legislation is for your personal use only and it may be subject to copyright, either the Council's or a third parties.

Simply because information is published on the Council's web site or available under the legislation does not mean the Council or the third party has waived its copyright.

If you do wish to re-use any information you must write in to Legal Services, Council Offices, Desford Road, Narborough, LE19 2EP.

How much does it cost?

Where information is available online it is free for you to download, and information that is already provided free of charge, such as leaflets and forms, will be emailed or posted at no cost.

The Council may make charges if the information requested is covered by a statutory fee or is listed in the Council's schedule of charges.

The Council may make charges for photocopying or posting information and you will be written to with the charges explained to you, any fee requested will need to be paid prior to the information being sent.

Should you have any queries about the scheme or wish to make a request please contact:-

Legal Services
Council Offices
Desford Road
Narborough
Leicester
LE19 2EP

Or email - foi@blaby.gov.uk

Information Class	Description	Where to obtain information
Who we are and what we do	Organisational information, structures, locations and contacts.	
	List of Council Services	http://www.blaby.gov.uk/ccm/portal/
	Council Constitution The council's constitution consists of a number of documents that, under the Local Government Act 2000, are required to be brought together and made available for public inspection. The articles of the constitution set out the basic principles that underlie the way the council operates.	Website http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/the-council/council-procedures/constitution/
	Council's Democratic Structure (Committees) Information not included in the constitution about the decision making bodies of the council and their role.	Website http://www.blaby.gov.uk/decision-making/mgListCommittees.asp?bcr=1
	Council Directorate Structure	On request

Information Class	Description	Where to obtain information
	Location and opening times of Council Offices	Website for location map of main offices http://www.blaby.gov.uk/ccm/portal/ Monday – Thurs 8.45am to 5.15pm Fri 8.45am to 4.45pm.
	Currently elected Councillors' information and contact details Ward Councillors' names, positions on the council and how they can be contacted.	Website http://www.blaby.gov.uk/decision-making/mgMemberIndex.asp?bcr=1
	Contact details for all customer facing departments	Website (main site and A to Z of services provided) http://www.blaby.gov.uk/ccm/portal/ http://www.blaby.gov.uk/atoz/jsp/atoz.jsp?letter=A
	Most Recent Election Results	Website http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/elections/

	<p>Relationships with other authorities Descriptions of the respective roles of different the types of local authorities – Unitary, Council and District, plus the Council’s partnership arrangements with other authorities and its relationship with central government departments is outlined.</p>	<p>Parish and Town Councils http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/parish-and-town-councils/</p> <p>Other authorities in Leicestershire http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/regional-governments/</p> <p>Central Government Contacts http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/regional-governments/government-offices/</p> <p>Role of the Council its divisions and functions http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/the-council/</p>
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Information Class	Description	Where to obtain information
What we spend and how we spend it	Financial information about projected and actual income and expenditure, procurement, contracts and financial audit. Information is available for the current and previous two financial years, both for the council as a whole but also for departments.	
	Financial statements, budgets and variance reports Financial information for both revenue budgets and budgets for capital expenditure to enable you to see where money is being spent.	Website Financial Statements (03/04 04/05 05/06 06/07) http://www.blaby.gov.uk/ccm/navigation/news-and-information/publications-library/corporate-documents/ All other information upon request.
	Capital Programme	On request
	Spending Reviews	On request
	Financial Audit Reports	On request
	The members allowance scheme and the allowances paid under it to Councillors each year The total of the allowances and expenses paid to councillors by reference to categories, for example travel, subsistence and accommodation. Council guidelines on the level and claiming of expenses can also be found here.	Published each year in the Blaby Chronicle – and available on request. Information on the members allowance scheme can also be found in the Council's

		constitution. http://www.blaby.gov.uk/ccm/content/council-government-democracy/councils/council-procedures/constitution/constitution-document-downloads.en
	Staff allowances and expenses Details of the allowances and expenses that can be claimed.	On request
	Pay and grading structure This is provided as part of the organisational structure and indicates, for all posts, levels of pay rather than individual salaries.	On request
	Procurement Procedures Details of Council procedures for acquiring goods and services and contracts available for public tender.	On request
	Details of contracts currently being tendered This information will relate to contracts that are large enough to have gone through formal tendering	On request Some Council tenders/services are provided through Eastern Shires Purchasing Organisation. http://www.espo.org/
	List of contracts awarded and their value Details of recent contracts awarded by the Council that have gone through formal tendering.	On request
	District Auditors Report	On request

	<p>Financial statements for projects and events Financial reports for identifiable projects and publicised organised events that indicate actual expenditure against original project budgets.</p>	On request
	<p>Internal financial regulations</p>	On request
	<p>Funding for partnership arrangements Details of the funding arrangements for partnerships where the council takes the lead role in the partnership arrangement. Details of the funding provided where the council contributes funding to a partnership arrangement managed by another authority</p>	On request

Information Class	Description	Where to obtain information
What are our priorities and how are we doing	<p>This section will include strategies and plans, performance indicators, audits, inspections and reviews. Information is available for the current and previous three years, not only for the council as a whole but also for departments where available. The following list shows you the type of information we include here. It is not extensive and the information includes reports or recorded information showing the council's planned or actual performance:</p> <ul style="list-style-type: none"> • Annual reports • Strategies and business plans for services provided by the council • Best value local performance plan • Internal and external organisation performance reviews • Strategies developed in partnership with other authorities <p>This includes community partnership strategies, safety and crime reduction strategies, road safety strategy, joint housing strategies, joint strategies for health issues and children's services.</p> <ul style="list-style-type: none"> • Economic development action plan • Forward plan • Capital strategy • Best value performance indicators • District auditor's reports on the best value performance plan and performance indicators • Comprehensive performance assessment • Inspection reports • Local Area Agreements 	<p>Much of the information can be found on the Council's website for anything not on the website please use the Council's form/email or write detailing the information you are requesting.</p>

	<ul style="list-style-type: none">• Statistical information produced in accordance with the council's and departmental requirements• Impact assessments• Service standards• Public service agreements	
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Information Class	Description	Where to obtain information
How we make decisions	Information on the decision-making processes and records of decisions, information will cover the time frame current year plus 3 previous years.	
	<p>Timetable of Council meetings Agendas, officers' reports, background papers and minutes of Council committees, sub committees and standing forum meetings. All this information is already publicly available under the local authority access to information rules.</p>	Website http://www.blaby.gov.uk/decision-making/uuCoverPage.asp?bcr=1
	<p>Major policy proposals and decisions The information provided under this section is what the Council can give you on these matters without damaging internal policy development and relations with other public authorities.</p>	On request
	Facts and analyses of facts considered when framing major policies	On request
	<p>Public consultations Details of concluded consultation exercises including access to the consultation papers or information about where the papers can be obtained. This area includes the results and outcomes of consultation exercises</p>	On request
	<p>Internal communications guidance, criteria used for decisions-making, internal instructions, manuals and guidelines. Where access to internal instructions, manuals and guidelines for dealing with the business of the council would help you understand how our decisions are made, these are included here</p>	On request

	except for the information we believe might damage the council's operations.	
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Information Class	Description	Where to obtain information
<p>Our policies and procedures</p>	<p>This section covers the Councils current written protocols, policies and procedures for delivering its services and responsibilities. Some of the information about policies and procedures may be covered by the council's constitution, so if you cannot find what you are looking for here please look there.</p>	
	<p>Policies and procedures for conducting council business Codes of practice, memoranda of understanding, procedural standing orders, internal guidance about the division of responsibilities between committees and delegated authority, policies on communications between councillors and members of staff and similar information.</p>	<p>Some information can be found on the website under the relevant sections for anything not online please request this information.</p>
	<p>Policies and procedures for delivering our services This includes local area agreement memoranda and policies and procedures for handling information requests.</p>	<p>Some information can be found on the website under the relevant sections for anything not online please request this information.</p>
	<p>Policies and procedures about the recruitment and employment of staff Vacancies advertised as part of recruitment policies and details of current vacancies. Our policies relating to our staff covering both the provision of services and the employment of staff for example, equality and diversity, and health and safety.</p>	<p>Current jobs are advertised via www.jobsgopublic.com Information is available on the website and on request. http://www.blaby.gov.uk/ccm/navigation/jobs-and-careers/</p>

	<p>Customer service Our standards for providing services to the council's customers, including the complaint procedure. Complaints procedures include those covering requests for information and operating the publication scheme.</p>	<p>Website http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/the-council/council-procedures/complaints-procedure/ http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/the-council/customer-services/</p>
	<p>Records management and personal data policies This includes information security policies, records retention, destruction and archive policies, and data protection (including data sharing) policies.</p>	<p>Website http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/information-management/</p>
	<p>Charging regimes and policies Details of any statutory charging regimes are provided here. Charging policies include charges made for information routinely published for example under Access to Information legislation, and detail what costs are recovered, the basis on which they are made, and how they are calculated.</p>	<p>On website http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/information-management/ Schedule of charges available on request</p>

Information Class	Description	Where to obtain information
Lists and Registers	This class only covers information held in current list and registers.	
	Register of councillors' financial and other interests Register of gifts and hospitality	On request
	Licensing (Taxi Drivers and Operators) (Personal and Premises)	http://www.blaby.gov.uk/ccm/navigation/business/business-and-street-trading/licences/public-register/
	Register of electors	Full register available for inspection at the main council offices
	List of current planning applications	Website http://www.blaby.gov.uk/ccm/navigation/environment/planning-new/latest-planning-information-online---public-access/
	Local Land Charges Register	Website for information about Land Charges – register available at the Council offices for inspection. http://www.blaby.gov.uk/ccm/navigation/environment/planning/land-searches/

	Register of Food Premises Register of Air Pollution Control in Industrial and Commercial Premises (Environmental Protection Act - Part 1) Register held under the Notification of Cooling Towers Regulations 1992	On request
	Register held under the Pet Animals Act Register held under the Animal Boarding Establishments Act Register held under the Breeding of Dogs Act Register held under the Dangerous Wild Animals Act Register held under the Riding Establishments Act Register of Licensed Butchers Shops Register of Stray Dogs Register of Hairdressers	On Request

Information Class	Description	Where to obtain information
<p>Services provided by the Council</p>	<p>This section current information about the services the council provides including leaflets, guidance and newsletters. This class is linked with the first class– Who are we and what do we do. While the first section provides information on the council and its departments’ roles and responsibilities, this section includes details of the services the council provides as a result of them. The following is a list of some of the services the council is responsible for and links to the relevant service pages on the website are provided</p> <p>Regulatory and licensing responsibilities Services for local businesses Press releases Refuse and Recycling Environmental Health Housing and Council tax benefits Council Tax collection Leisure Services Housing Planning (development control) Building control Community Safety</p> <p>If the service you are looking for is not in this list, please look on the Council’s Internet site.</p>	<p>Website</p> <p>Regulatory and licensing responsibilities http://www.blaby.gov.uk/ccm/navigation/business/business-and-street-trading-licences/</p> <p>Environmental Licences http://www.blaby.gov.uk/ccm/navigation/environment/</p> <p>Local Businesses http://www.blaby.gov.uk/ccm/navigation/business/economic-development/</p> <p>Media releases http://www.blaby.gov.uk/ccm/navigation/news-and-information/press-releases/</p> <p>Refuse and Recycling http://www.blaby.gov.uk/ccm/navigation/environment/rubbish-waste-and-recycling/</p>

		<p>Environmental Health http://www.blaby.gov.uk/ccm/navigation/environment/</p> <p>Housing and council tax benefits http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/the-council/council-tax-and-finance/council-tax-benefit/</p> <p>Council Tax collection http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/the-council/council-tax-and-finance/</p> <p>Leisure Services http://www.blaby.gov.uk/ccm/navigation/leisure-and-culture/</p> <p>Housing http://www.blaby.gov.uk/ccm/navigation/housing/</p> <p>Planning (development control) http://www.blaby.gov.uk/ccm/navigation/environment/planning-new/</p>
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		<p>Building control http://www.blaby.gov.uk/ccm/navigation/environment/land-and-premises/buildings/</p> <p>Community Safety http://www.blaby.gov.uk/ccm/navigation/policing-and-public-safety/</p>
	<p>Election information The offices of the Returning Officer and of the Electoral Registration Officer are separate to the functions of the Council.</p> <p>Information held by us on behalf of these two offices is not currently covered by the Freedom of Information Act. However, much of the information about elections is also held by the Council and where we are allowed to by law we will make this information available through the publication scheme, for example forthcoming elections, election results, review of polling stations, information on becoming a councillor, voting procedures</p>	<p>http://www.blaby.gov.uk/ccm/navigation/council-government-democracy/elections/</p>

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Constitutional Amendments
Report of:	Legal Services Manager
Status:	Public

1. Purpose of Report

- 1.1 To put to the Cabinet Executive suggested changes to the Constitution in relation to the Officer Delegation Scheme.

2.	<u>Recommendation</u>
2.1	That the amendments to the Constitution detailed at Appendix A be approved and adopted.
3.	<u>Reason for Decision Recommended</u>
3.1	To ensure an appropriate range of delegation.
3.2	To update the Constitution in light of the completion of the Housing Stock Transfer.

4. Forward Plan

- 4.1 Forward Plan Reference Number: 07/06(585).

5. Key Decision

- 5.1 Yes.

6. Matters for Consideration

- 6.1 Amendments to the Constitution are reserved to the Council, as Article 4.2 refers, except where the responsibility lies with the Cabinet Executive in relation to the exercise of its functions.
- 6.2 The amendments are detailed in Appendix A of the report together with the reasons for the proposed alterations.

7. Other Relevant Considerations

- 7.1 None.

8. Other Options Considered

8.1 None.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 None.

11. Appendix to this report.

11.1 Appendix A – Constitutional Amendments.

12. List of Background Papers

12.1 None.

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- ✓ **Monitoring Officer** (Legal Services Manager)
- Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

APPENDIX A

Amendment Ref.	Page Ref.	Amendment	Reason
1.	3 – 1 – 56	Insert new Item 4, Column 1 – 'To manage the Council's housing stock and associated property.'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer.
2.	3 – 1 – 56	Insert new Item 4, Column 2 – 'DAGM (This is also delegated to Housing & Community Services Group Manager)'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer. To ensure an appropriate range of delegation is in place.
3.	3 – 1 – 56	Insert new Item 5, Column 1 – 'To serve notice: <ul style="list-style-type: none"> • to quit • of seeking possession' 	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer.
4.	3 – 1 – 56	Insert new Item 5, Column 2 – 'DAGM (This is also delegated to Housing & Community Services Group Manager)'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer. To ensure an appropriate range of delegation is in place.
5.	3 – 1 – 56	Insert new Item 6, Column 1 – 'To apply for a possession order and suspend action if deemed necessary.'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer.
6.	3 – 1 – 56	Insert new Item 6, Column 2 – 'DAGM (This is also delegated to Housing & Community Services Group Manager)'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer. To ensure an appropriate range of delegation is in place.

Amendment Ref.	Page Ref.	Amendment	Reason
7.	3 – 1 – 71	Insert new Item 9, Column 1 – 'To manage the Council's housing stock and associated property.'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer.
8.	3 – 1 – 71	Insert new Item 9, Column 2 – 'HCSGM (This is also delegated to Development & Assets Group Manager)'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer. To ensure an appropriate range of delegation is in place.
9.	3 – 1 – 71	Insert new Item 10, Column 1 – 'To serve notice: <ul style="list-style-type: none"> • to quit • of seeking possession' 	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer.
10.	3 – 1 – 71	Insert new Item 10, Column 2 – 'HCSGM (This is also delegated to Development & Assets Group Manager)'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer. To ensure an appropriate range of delegation is in place.
11.	3 – 1 – 71	Insert new Item 11, Column 1 – 'To apply for a possession order and suspend action if deemed necessary.'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer.
12.	3 – 1 – 71	Insert new Item 11, Column 2 – 'HCSGM (This is also delegated to Development & Assets Group Manager)'	Due to Council having temporary ownership of Duncan Avenue and Garage Sites following completion of Housing Stock Transfer. To ensure an appropriate range of delegation is in place.

BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Data Quality Policy
Report of:	Performance & Audit Manager
Status:	Public

1. Purpose of Report

- 1.1 The purpose of this report is to seek approval for the proposed draft Data Quality Policy attached as Appendix 1 to this report, and which commits the Council to the standards set out in the Leicestershire Together Data Quality Strategy (LTDQS).

2.	<u>Recommendation</u>
2.1	It is recommended that the attached draft Data Quality Policy, aligned to the standards set out in the Leicestershire Together Data Quality Strategy, be approved.
3.	<u>Reasons for Decision Recommended</u>
3.1	It is appropriate and good practice that the Council adopts a comprehensive Data Quality Policy. Such a policy provides a robust framework within which the quality and reliability of all performance data held by and reported on by the Council can be improved.
3.2	Under the forthcoming Comprehensive Area Assessment (CAA), to be introduced from April 2009, Councils will be expected to have effective arrangements in place for managing data quality.

4. Forward Plan

- 4.1 10/08(054).

5. Key Decision

- 5.1 Yes.

6. Matters for Consideration

- 6.1 The Council uses data for a variety of important purposes - to inform, to deliver and help measure its services to the public, to benchmark performance and to ensure continuous improvement in service quality,

customer care and cost. It is also the information used for external assessment of the Council's performance by central government bodies such as the Audit Commission.

- 6.2 To be effective for these purposes, it is vital that data is produced to the highest quality standards i.e. that it is accurate, timely, relevant and is fit for its intended purpose. In order to assure such quality, the draft Data Quality Policy attached as Appendix 1, has been developed. This is a comprehensive policy covering all aspects of the collection, recording, calculation, analysis and reporting of all performance related data across all parts of the Council. It also covers the exchange/sharing of such data with partner organizations, and data produced by other third parties, including contractors.
- 6.3 With increased partnership working in recent years, data quality has also become important in relation to the increasing flow of data being exchanged or shared between the Council and its partner organizations.
- 6.4 This requirement has been addressed by the Leicestershire Information Management Advisory Group, (LIMAG) who have produced the Leicestershire Together Data Quality Strategy (LTDQS).
- 6.5 The purpose of the LIMAG strategy is to set out a common approach to data quality across public sector partners in Leicester and Leicester shire to help ensure consistency and continuity of information shared between them. The strategy prescribes a data quality framework which sets minimum standards with which participating organizations are expected to comply.
- 6.6 Accordingly, this Policy and its related procedures have been designed to comply with the LTDQS framework standards

7. Other Relevant Considerations

7.1 Equalities

- 7.1.1 No EINA is required for this report

8. Other Options Considered

- 8.1 Not to adopt a Data Quality Policy, but this would be at variance with the need to improve data quality and commitment to comply with the standards of the LTDQS.

9. Appropriate Consultations

- 9.1 None

10. Financial and Efficiency Implications

- 10.1 None in the context of this report.

11. Appendix to this report

- 11.1 Draft BDC Data Quality Policy (Appendix 1).

12. List of Background Papers

- 12.1 Leicestershire Together Data Quality Strategy, LIMAG, 2008.
- 12.2 Management arrangements for Data Quality – Key Lines of Enquiry 2008 – Audit Commission, 2008.

The following Officers/Members have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder

DRAFT DATA QUALITY POLICY - BLABY DISTRICT COUNCIL

1. Introduction

The Council collects and reports upon a range of data which needs to be maintained and calculated accurately. This includes various types of Performance Indicators (PI's) e.g. quarterly monitored Key Performance Indicators (KPI's), National Indicators (NI's) reported to central government, and other Local PI data contained within the Annual Report and Performance Plan (ARPP), and all other statutory returns. All of these must be robust and able to withstand scrutiny.

To be effective, data must be accurate, timely, relevant and fit for purpose. External bodies such as the Audit Commission are increasingly using such data to assess Councils' performance, and placing a stronger emphasis on data quality. In particular, external audit is evolving into a more challenging scrutiny of system controls, such as procedures, policy and leadership where auditors and inspectors test the robustness of such systems to reach conclusions on the quality and reliability of a Council's performance information

This is clearly seen in the proposals for the 2009 Use of Resources (Value for Money) assessment and the forthcoming Comprehensive Area Assessment (CAA) where Councils will be expected to have effective arrangements in place for managing data quality.

More specifically, a comprehensive data quality policy is required to be in place in order for Councils to achieve a score of 'above minimum standards' or 'excellent' in the relevant sections of the Audit Commission's assessment of management arrangements for data quality. Scores for data quality feed into overall scores for Use of Resources.

2. Data Quality

The Council uses data to inform, to help measure its services to the public, to benchmark performance and ensure continuous improvement in service quality, customer care and cost. It is also the information used for external assessment of the Council's performance.

To be effective for these purposes, it is vital that data is produced to the highest quality standards i.e. that it is accurate, timely, relevant and is fit for its intended purpose. To this end, the Council has agreed procedures, set out in this Policy, for the collection and reporting of data and associated systems for data verification in order to assure quality.

With increased partnership working in recent years, data quality has also become important in relation to the increasing flow of data being exchanged or shared between the Council and its partner organizations.

The Council is fully committed to continuously improving all aspects of data quality and related performance information systems and procedures, and has signed up to 'clearly identifying responsibilities and actions to improve the quality of data used by

the Council in decision making' within the Corporate Plan 2008 – 11, (Ambition 16, Objective D3).

This Policy will be reviewed annually and updated as necessary with full staff involvement.

3. Policy Scope

This is a comprehensive policy covering all aspects of the collection, recording, calculation, analysis and reporting of all data, including performance related data, across all parts of the Council, the exchange/sharing of such data with partner organizations, and data produced by other third parties, including contractors.

It defines the Council's operational procedures and monitoring arrangements and is designed to comply with relevant national and local (common) quality standards and statutory provisions.

In the case of the latter, these have been recently addressed in the Leicestershire Together Data Quality Strategy (LTDQS) produced by the Leicestershire Information Management Advisory Group, (LIMAG).

The purpose of the LIMAG strategy is to set out a common approach to data quality across public sector partners in Leicester and Leicestershire to help ensure consistency and continuity of information shared between partner organizations. The strategy prescribes a data quality framework representing minimum standards with which participating organizations are expected to comply.

Accordingly, this Policy and its related procedures have been designed to comply with the LTDQS framework standards.

Please note that issues relating to the Data Protection Act and the Freedom of Information Act are covered in the Council's Data Protection and Freedom of Information Policies respectively.

4. Key Principles

The Council is fully committed to the continuous improvement of all aspects of data quality and related information systems. Data in this respect includes all data used by the Council in making decisions but particularly data related to the management of the Council's service delivery and performance, as exemplified by those indicators referred to in the Introductory section.

Within this context, the key principles which underpin this policy can be simply stated as - performance data should be :

- ★ 100% accurate first time and 100% of the time ('right first time')
- ★ Relevant, timely and complete
- ★ Calculated and collected once, but used numerous times (COUNT)
- ★ An integral part/output of the Council's normal business processes, which support staff in their day to day work

Data quality is a responsibility of all Council staff and an integral part of the job descriptions of specific posts.

The above principles will also apply to data shared with or received from public sector partner organizations, and that produced by third party contractors to the Council. In the case of the former, data management and use shall comply with the Leicester Shire Information Sharing Protocol (or any other agreed by IMAG).

The next section of this Policy sets out the operational framework whereby these principles are applied in practice.

5. Management Roles and Responsibilities

Officers

All staff entering, extracting or analysing data to/from any of the Council's information systems have a prime responsibility for data quality, as do their line, Group and Corporate managers.

Within this overall context, it is nevertheless important that there are clearly defined roles for relevant staff in ensuring coherence in the management of performance and of data quality across the Council.

Thus the following roles and responsibilities are proposed for specific aspects of data quality and its improvement :

- Deputy Chief Executive – Overall strategic responsibility for data quality
- Corporate, Group and designated operational Managers – Strategic responsibility for data quality submitted from the service, and assignment of Data Owner and Data Collector responsibilities.
- Portfolio Holder – Political responsibility at Cabinet level for data quality submitted from the service
- Performance & Audit Manager – Responsible for the corporate performance management and data quality policy frameworks and procedures and compliance with national and legislative requirements
- Data Owner – Operational accountability for assurance/verification of data quality submitted from their service area. The Data Owner may be a Manager and/or may also be the Data Collector.
- Data Collector – Operational responsibility for gathering data within their service area. This includes the calculation of relevant PI's and the collation of associated supporting evidence ie data returns and working papers etc.
- Internal Audit – Independent checking of data quality and validation of associated systems and controls.

In order to discharge these responsibilities, Corporate, Group and designated operational Managers will ensure that, within individual service areas :

- Appropriate systems are in place to collect, collate and calculate performance data ('right first time'), that they are fit for purpose, that systems/procedure

notes/manuals are in place for service-critical systems and that these are reviewed and updated as appropriate.

- All relevant staff (and third parties) are aware of their requirements for assuring data quality including the appointment of data champions. Within each annual Service Plan the responsible Manager provides a Statement of Responsibility for Data Quality for their service area, including the performance data reported in the Plan.
- Appropriate risk management and business continuity management arrangements are in place regarding data quality - see under 'Risks' section.

Elected Members

The Cabinet Portfolio Member for Customer Focus and Performance will be the lead Member for data quality issues and will receive annual assessments on the progress each service area makes regarding such issues, and is the Member Data Quality Champion.

All Members are responsible for challenging the robustness of such data supplied to them to enable them to make decisions and monitor performance.

6. People and Skills

Staff at all levels within the Council should have appropriate knowledge, competencies and capacity for their roles in relation to data quality, to be ensured through appropriate recruitment, management and training procedures.

Training on data quality will be provided as a priority to those with strategic and operational responsibilities for data. This will be done generally 'on-the-job' in a variety of ways, e.g. by dissemination of good practice and technical guidance, support from managers themselves, and support from the Performance & Audit Team in terms of technical advice and training workshops. The Performance & Audit Team will carry out an annual assessment of the specific training required.

All members of staff (including consultants, temporary and contract staff) will be expected to understand their particular responsibility for the quality of data held by, and on behalf of, the Council.

Responsibility for data quality should be reflected in job descriptions and the appraisal process. Services are encouraged to ensure that suitable appraisal targets and criteria in job descriptions are included.

Members will receive appropriate training on the importance of data management and data quality.

7. Risks

Failure to put in place adequate arrangements to promote high levels of data quality management within the Council could lead to adverse external reports on the Council's overall performance, and also attract financial penalties as the Council's

external funding sources could be reduced.

Areas that can be classified as 'high risk' conditions include:

- A high volume of data transactions.
- Technically complex performance information definitions/guidance.
- Problems identified in previous years.
- Inexperienced staff involved in data processing/performance information production.
- A system being used to produce new performance information.
- Known gaps in the control environment.
- Results differing significantly from previous years outturn or target

These risks will be minimised by following the procedures set out in this policy document.

Data quality is embedded in the Council's Risk Register.

8. Data Use and Reporting

Data is kept by the Council for a range of purposes, including service delivery (e.g. population, households, addresses), and performance management (e.g. performance indicators). In all cases it is important that it is accurate and up to date.

In the case of performance data, **every** reported performance indicator - KPI's, NI's and designated Local PI's - will have a designated Manager with strategic responsibility i.e. for managing progress on improvement, for managing any associated risks and for verifying the accuracy of reported outturns.

Operationally, each such indicator will also have both a Data Owner and a Data Collector (which can be the same person) assigned by a Corporate/Group Manager - see Section 'Roles and Responsibilities'

Outturn data will be produced as soon as is practicable after the required timescale has elapsed – e.g. 3 months, 6 months or a year. **In all cases** the Data Collector will ensure that calculations/workings are checked by the Data Owner with the aim of reducing to zero the potential for error. A similar validation process will be required for data received from third parties.

All outturns which are regularly reported either to Cabinet, Central Government or other public sector partners will be required to be verified/quality assured by the relevant Manager with strategic responsibility for the service/PI.

In the case of NI's, there are 21 that the Council has to report on, as at January 2008, including those designated in the LAA and for which countywide targets have been set.

These 21 NI's comprise 6 indicators calculated and reported by the Council directly to the national Hub whilst the remainder are reported indirectly through existing data returns to Central Government. The values for the former will be supplied by service Managers and uploaded to the Hub by the Performance Team.

The intention is that all 21 of these will be calculated at least annually by their respective Data Collector/Owners and fed into the PbViews system. The Data Owner, by submitting the data confirms that the data provided has been produced accurately, and is consistent with values reported by other means. Working papers and other auditable evidence for each NI will also be produced and held on file, as was the practice with BVPI's .

Corporate/Group/Service Managers will be required to verify, authorize and sign off the NI's annually at year end.

NI's will be subject to annual checking by internal audit – in 2008/09 this will cover all 21 NI's, thereafter the number and selection of NI's for such checking will be risk based, but is likely to include all those that are designated in the LAA.

Under the new performance framework for CAA, Councils will be expected to have effective arrangements in place for managing data quality. Nevertheless, it is reasonable to assume that Councils' performance information is likely to continue to be validated through an external audit process.

During such audits the Data Collector should be available to provide all supporting information and if that officer is not available, there should be at least one other officer who is able to provide advice and information on the P.I., e.g. the Data Owner. This is important to ensure that audit work proceeds smoothly. As currently, the audit will require working papers to confirm that definitions have been followed, the calculations are correct and that the indicator is supported by a full audit trail.

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Business Development at The Pavilion
Report of:	Pavilion Manager
Status:	Public

1. Purpose of Report

- 1.1 To highlight the need for change in the day to day staffing arrangements and operation of The Pavilion, to form the basis of a sound operational foundation enabling the facility to improve its services and meet financial expectations

2.	<u>Recommendations</u>
2.1	To implement a structure that is robust and provides a framework to succeed in delivering a community based centre for leisure provision with clear reporting lines to The Pavilion Manager.(See appendix 1).
2.2	Terminate agency agreement with SLM.
3.	<u>Reasons for Decisions Recommended</u>
3.1	Provide a structure for managing & developing the pavilion's services that will enable the council to deliver on its corporate priorities.
3.2	Implement a team who have ownership and a mandate to manage.
3.3	Deliver the Council's corporate identity at The Facility.
3.4	The current agreement does not provide The Pavilion Manager with adequate influence to control or develop SLM staff to provide a consistent service in delivery or efficiency.
3.5	The current agency agreement enables the delivery of a minimum service.
3.6	The proposed re structure will enable effective performance management, delivered directly through BDC, giving opportunities to greatly improve key areas such as customer service, communications & marketing.
3.7	The current arrangement offers no incentives for agency staff to deliver a quality service to our customers.
3.8	The recommended structure will enable effective business planning and ensure the success of a wider range of services & activities.

4. Forward Plan

4.1 Forward Plan Reference Number: 10/08 (056)

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 The Pavilion was taken back in house in April 2007 with SLM providing evening & weekend Duty Management cover, Reception cover, Cleaning Cover & Bar staff between the hours of 3 - 11pm Monday to Friday and 9am - 5pm Saturday & Sunday. The annual fee for this is £88,500.00; this includes a 10% agency cost for the service to be provided. (Refer to Cabinet Executive Report – 7th December 2006 Agenda Item 9, Appendix 4. Also Cabinet Executive Report – 30th June 2008 Appendix 5).

6.2 The current agreement with SLM runs until 31st March 2009. (See appendix 3 & 3a)

6.3 Since arriving in post on 1st October I have identified through a full service review that in my professional opinion as Pavilion Manager, that the SLM agreement is not fit for purpose for the following reasons:-

6.3.1 It does not provide any day time operational staff; The Pavilion Manager currently undertakes this role. This gives little capacity to develop The Pavilion as a “hub” for wider community activity. The Councils corporate plan 2008-11 details clear direction for Health and Recreation services, including development of services at The Pavilion by the Pavilion Manager.

6.3.2 No customer services staff are present at the Pavilion and therefore as a result of employing personnel through the SLM agreement the Pavilion lacks Blaby District Council’s corporate identity.

6.3.3 The Pavilion Manager has no control over core business functions such as operational service delivery. Therefore, this does not provide any framework for customer service improvement.

6.3.4 Has no capacity to challenge & improve existing delivery through systems thinking.

6.3.5 The new structure proposal provides the platform for service review in terms of “systems thinking”, customer feedback & evaluation, business growth with a planned and resourced approach enabling focus on key areas of the operation which will deliver financial return. (See appendix 1)

7. Other Relevant Considerations

7.1 The Pavilion Manager is aware of the proposed children’s centre and the potential for disruption to the facility. The proposed structure provides operational capacity to manage any disruption and maintain excellent customer service. The current staffing provision would be unable to respond to the disruption and would not provide the necessary levels of customer

service and deliver day to day operational requirements.

- 7.2 It will provide a tiered management structure to enable The Pavilion Manager to have a focus on key elements that will deliver the required improvements such as Marketing, Pricing, Budget profiling to create a firm foundation to build the business.
- 7.3 The proposed structure will enable a focus on the wider corporate priorities and support the delivery of such initiatives as the GP referral scheme, Active together project, cultural Olympiad action plan, 5 hour offers for culture & Sport.

Legal Implications

TUPE regulations are not relevant to the termination of this contract, since Blaby District Council own the business and therefore staff provided by SLM are not subject to TUPE.

Equalities

An EINA has been undertaken as part of this report.

Risk Assessment

The risk of being unable to recruit to these key posts in the current job market. This can be mitigated by Blaby's recruitment and retention policies and through targeted advertising of the posts through schools, colleagues and other leisure industry publications

The Pavilion supports the delivery of a number of corporate priorities, an ineffective staffing structure jeopardises the delivery of corporate activities.

8. Other Options Considered

Renew the current agency agreement with SLM for a further 12 months but this would not be the preferred option in my opinion because of the shortcomings already documented.

It could be deemed that an option would be to increase the agreement with SLM to meet the demand of the operational requirement but this would incur fees when we could do it ourselves.

9. Appropriate Consultations

Since being in post I have reviewed the current arrangement between BDC & SLM by engagement with Tammy Parker (Health & Recreation Manager), Jamie Clarke (Sports Development Officer), Steve Beard (Director of Operations), and Clare Proudfoot (Health & Leisure Group Manager), Jane Toman (Director of People & Performance).

10. Financial and Efficiency Implications

- 10.1 An additional £19,000 against staff costs will be required to implement this

recommendation.

- 10.2 The £19,000 will be covered by income growth, however, I anticipate through the implementation of this proposal income will be exceeded further. (See below & Appendix 2 for forecast on projected calculations). I am confident that savings are also available through reduced energy consumption but this opportunity has not been factored in as I have not been serviced with energy unit rates at the time of writing.

	Current year	2009/10	Growth
<u>Expenditure</u>			
Agency fees	£88,500	£0	
Establishment	£ 6,000	£113,592	£19,092
<u>Total Income</u>	<u>£105,000</u>	<u>£127,100</u>	<u>£22,100</u>
Outdoor Courts	£ 17,584	£ 32,710	£15,126
Memberships	£ 2,018	£ 3,188	£ 1,170
Food & Beverage	£ 1,619	£ 5,704	£ 4,085
Commercial users & VAT	£ 0	£ 0	£ 1,719
<u>Nett Gain</u>			<u>£3,008</u>

11. **Appendices to this report**

- 11.1 Diagram of proposed staffing structure – Appendix 1
- 11.2 Financial Plan of Establishment costs & Projected income forecasts for Apr 1st 2009 – Mar 31st 2010 – Appendix 2.

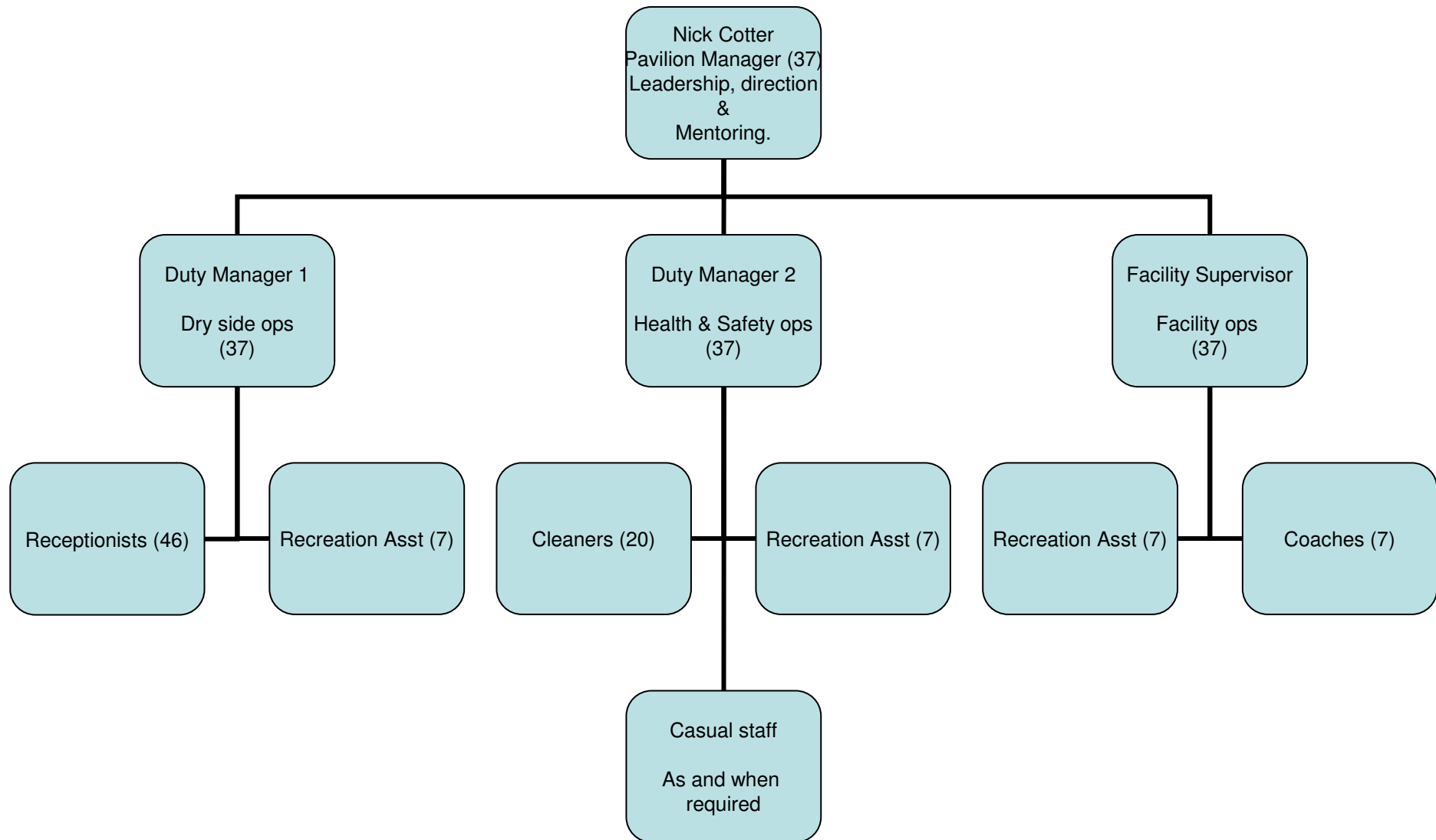
12. **List of Background Papers**

- 12.1 Provision of Staff – Letter to SLM 18.12.07, Mark Leahy email confirming staff provision , Pavilion 24.3.08.
- 12.2 Cabinet Executive Report 7th December 2006 Agenda Item 9.
- 12.3 Cabinet Executive Report 30th June 2008 Agenda Item 13.

The following Officers/Members have been consulted (identified by ✓):

- ✓ **Head of Paid Service** (Chief Executive)
- ✓ **S. 151 Officer** (Deputy Chief Executive)
- Monitoring Officer** (Legal Services Manager)
- ✓ **Cabinet Executive Portfolio Holder** (Cabinet Executive/Council reports only)

The Pavilion – Ops Structure.



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Pavilion Staffing cost Proposal 2009/10

APPENDIX 2

Post/Hrs per week	Hourly Rate	SUPER 1 EE'S SA Contribution %	SP	GRADE	SALARY	SUPER	NI	NI REB	FRS17 17%	(for 37 hour week NI scheme D) Pro rata
Duty Manager (37)	8.44	5.9	15	2	16241	2396	983	-28	365	19957
Duty Manager (37)	8.44	5.9	15	2	16241	2396	983	-28	365	19957
Facility Supervisor (37)	7.91	5.9	12	2	15215	2244	890	-28	342	18663
Receptionist (23)	6.32	5.5	4	1	7556	1230	445	-28	245	9448
Receptionist (23)	6.32	5.5	4	1	7556	1230	445	-28	245	9448
Recreation Asst (10)	6.32	5.5	4	1	3286	526	201	-28	158	4143
Recreation Asst (10)	6.32	5.5	4	1	3286	526	201	-28	158	4143
Cleaner (20)	6.32	5.5	4	1	6573	944	352	-28	198	8039
Admin (10)	8.44	5.9	15	2	4389	786	251	-28	163	5561
Bar (7)	6.32	5.5	4	1	2299	344	176	-28	108	2899
Instructors (7)	25				9100	1456	501	-28	305	11334

Total 09/10 **£113,592.00**

Total 08/09 **£94,500.00**

Growth **£19,092.00**

Projected Income forecasts - Calculations

GROWTH 2009/2010		CALCULATIONS
OUTDOOR COURTS	£15,126	
Increased Patronage	£2,870	£20 + £25 = £45/2 = £22.50 / 1.175 = £19.148 av price = additional 150 court sales / 52 weeks = 2.88 courts per week (based on current prices without annual increase.
Soccer Leagues	£12,255	2 leagues of 10 teams playing 1 night per week for 48 weeks, 10 games per night x £15 per team x 20 teams = £14,400/1.175 = £12,255
MEMBERSHIPS	£1,170	
Centre Membership	£1,170	£35.25 Av Price/1.175 = £30. £1170/£30 = additional 39 memberships sold.
Raquets membership		Further Opportunity to be explored.
FOOD & BEVERAGE	£4,085	
Bar Sales	£4,085	50% of soccer league teams visiting the bar based on 4 players spending £2.50 each per night x 10 teams x 48 weeks = £4800/1.175 = £4085
Vending		Additional income via vending through greater footfall.
COMMERCIAL USAGE	£1,719	
Gymnastic Club	£431	Parent & Child Gymnastics Monday's 10.30 to 11.30am x £13 X 39 wks = £507/1.175 = £431
VAT registered Clubs	£1,288	Currently VAT is being declared on these clubs when it should not be and work is in progress to address this and reclaim further monies from HMR&C
Total	<u>£22,100</u>	

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BLABY DISTRICT COUNCIL

Meeting:	Cabinet Executive
Date:	01 December 2008
Subject:	Establishment Budget 2008/09 and 2009/10
Report of:	Director of People and Performance and Financial Services Group Manager
Status:	Public

1. Purpose of Report

To set out, for consideration by the Cabinet Executive, the revised establishment budget for the current financial year and the proposed budget for 2009/10.

2.	<u>Recommendation</u>
2.1	The Cabinet Executive is asked to consider and approve the content of this report in advance of the detailed service budget proposals and in the context of the overall budget strategy for next financial year. The establishment costs will be incorporated into the General Fund and Capital Programme draft budgets for consideration by the Cabinet Executive at a later date.
3.	<u>Reason for Decision Recommended</u>
3.1	To make Cabinet Executive aware of the establishment costs which will influence the overall General Fund budget proposals for 2009/10.

4. Forward Plan

4.1 Forward Plan Reference Number: 12/07(738).

5. Key Decision

5.1 Yes.

6. Matters for Consideration

6.1 ESTABLISHMENT BUDGETS 2008/09 AND 2009/10

Establishment costs account for approximately one third of the Council's combined gross annual expenditure across the General Fund and Housing Revenue Account. The majority of the budget consists of wages, salaries, employers superannuation and national insurance contributions but also includes provisions for sickness, maternity leave, temporary staffing and agency costs. Contingency sums are incorporated into the budget to provide a source of funds to meet unplanned establishment related costs which may arise during the course of the year.

Set out in this report and the table at Appendix A are the key facts and figures relating to the size and structure of the establishment, the associated costs and additional information in respect of a number of staff related issues.

The report is based on the information which is available at the present time and is based on the current establishment. Any future changes that are proposed will be reflected in the final budget proposals if known, otherwise will be incorporated at the appropriate point when the budget is revised.

The establishment budget has been calculated after taking into account the Council's housing stock transferring on 3rd November 2008.

6.1.1 Establishment Budget – Current Year

- i. The original net establishment budget of £10,323,296 for 2008/09 was approved in December of last year. Following the completion of the budget process, changes to establishment related costs were incorporated into the estimates and are reflected within the revised figures.

These are shown in Table 1 below.

The net revised budget of £9,680,808 shown in column D at Appendix A, incorporates the changes which were approved during the course of the year, including the impact of the transfer of housing staff to Three Oaks Homes at the beginning of November.

- ii. Efficiency Savings

As part of the original 2008/09 establishment budget proposals it was agreed to achieve savings of £160,000 in staffing costs during the course of the current year. As at the end of September 2008, gross savings of £508,032 have been achieved, through vacant posts. However, it has been necessary, for operational reasons, to employ temporary and agency staff in certain key areas, which has resulted in a net saving of £177,297 as at the end of September. It is therefore anticipated that, the original required saving of £160,000 will be comfortably achieved by the 31st March, 2009.

Table 1

	£	£
Establishment Budget as approved December 2007 Gross		10,323,296
<i>Add:</i>		
Adjustment for increased pension costs		82,836
3 Additional posts – Refuse		63,262
Environmental Protection – additional call-out costs		1,280
Community Safety – increased hours		4,105
Pest Control – temporary labour		3,000
<i>Less:</i>		
Additional vacancy savings		10,000
Building works unit – reduced hours		12,148
HRA- wardens reduced costs		1,000
Atmospheric Pollution – savings		3,110
Reduction in Xmas recycling budget		5,000
Budget per February 2008 final budget report		10,446,521

6.1.2 **Staff Turnover**

Turnover of staff within the establishment has reduced over the last year. Over the last 12 months 37 employees have resigned or retired from establishment posts compared with 39 for the same period previously, representing a turnover of approximately 11.39%. The most recently available national average is 13.9% across the public sector.

A proportion of days lost due to vacancies is recovered by employing temporary and agency staff where required. At the end of September, 2008 the Council had incurred £330,735 in respect of agency/temporary staff costs compared to £348,999 for the same period the previous year. At this point in time these costs have been contained within the existing overall revised budget and the position is being constantly monitored.

6.1.3 **Sickness Absence**

The 2007/08 Performance Indicator for sickness, shows that an average of 9.11 days were being lost per employee last year through sickness. This is higher than in previous years, and above the national average of 9.8 days for sickness absence in local government (source = CIPD October 2007).

However, it is pleasing to report that during 2008/09 there has been a significant decrease in the level of sickness absence, following the implementation of the Council's absence management policy. The authority is continuing to seek to reduce sickness absence on an ongoing basis.

6.1.4 **Current Year Position**

At the half-year stage actual expenditure on establishment costs was £5,065,301 plus the costs of the pay award, estimated at £114,784, which represents 49.59% of the full year revised gross budget of £10,446,521. There are a number of vacancies that continue to be covered by temporary or agency staff but it is still anticipated that final outturn costs will remain comfortably within the revised budget.

6.2 **BUDGET PROPOSALS 2009/10**

6.2.1 **Personnel Statistics**

The establishment currently equates to 294.75 full time equivalent posts (F.T.E.), a decrease of 51.62 FTE's over the position 12 months ago. The table at Appendix B summarises the movement between September 2007 and estimated as at 1st April 2009, and takes into account the transfer of the housing staff to Three Oaks Homes.

6.2.2 **On-Costs**

National Insurance

The employers National Insurance contributions for 2009/10 have been incorporated into the budgets at the current rate. Any subsequent changes to the rates will be reported to the Cabinet Executive as and when the Council is advised.

Superannuation – Pension Contributions

The Council's contributions to the Leicestershire Superannuation Fund have been included at a rate of 250% of the employees contributions for both 2008/09 and 2009/10.

FRS17

The Council is required to fully implement the implications of the Financial Reporting Standard (FRS17) on Retirement Benefits.

The objective of this is to ensure that retirement benefits are accounted for when they are committed to, even though the actual "giving" may be several years into the future. This ensures a better reflection of the economic reality between the employer and the pension fund, showing any shortfalls or surpluses in the net assets in the pension scheme.

Service costs will therefore reflect the 'current service cost' as assessed by actuaries, with corresponding adjustments being made within the Consolidated Revenue Account to ensure that the Council Tax requirements reflects only actual contributions.

Actuarial valuations are undertaken on the Council's behalf in May of each year in order to establish our current position in respect of FRS17. Any significant changes will be reported at that time.

6.2.3 **Establishment Details**

The estimated costs projected for 2009/10, as shown in Column G of the table at Appendix A, are based on the forecast establishment as at 1st April, 2009. They are inclusive of any scale increments which are applicable to employees with effect from the 1st April 2009 and the cost of employer pension and national insurance contributions. The figures also incorporate an estimated pay award of 2.475%.

The analysis includes provisions for seasonal temporary assistance in respect of the front-line workforce and overtime/market supplement budgets where applicable.

The overall gross increase from the original budget for the current year on a like for like basis is calculated at £120,684 inclusive of the increments and full year costs of newly established posts and those posts currently vacant. This is therefore a comparison of the original 2008/09 budget and the 2009/10 budget not including any of the transferred staff to Three Oaks Homes. It also reflects the financial implications of the recent management restructure. The net establishment budget, in respect of the General Fund, after taking into account the implications of the forecast pay award, external funding and capitalisation of certain salaries is estimated at £9,022,391. This represents a 1.36% increase over the original net budget for the current year (equivalent figure at this time last year was 3.37%).

6.2.4 **External Funding**

Columns C and F of the table at Appendix A indicate those posts which have been and/or are planned to be funded externally and/or from balances over the two years 2009/09 and 2009/10.

Members should be aware that the contribution from these particular funding sources has reduced from £210,214 in the current year to an estimated £85,010 for 2009/10 (a year on year reduction of 59.56%).

6.2.5 **Summary**

The overall proposed level of increase in establishment costs for 2009/10 is, at 1.36% a less than inflationary figure but importantly also takes into account the estimated net savings of £100,000 arising from the recent management restructure. 2009/10 will undoubtedly represent a challenging year in terms of delivering a balanced budget and these costs form an important element of the overall equation.

6.2.6 The table below shows the sources of the external funds receivable.

	2008/2009 Original £	2008/2009 Revised £	2009/10 First £
Community Development			
- Building Safer Communities	0	18,199	0
- Anti-Social Behaviour	0	0	0
- Sports Development Officer	4,221	4,220	4,326
- External Funding Officer	13,145	0	0
- Physical Activity Officer	50,602	48,730	25,198
Housing			
- Homelessness Grant	31,450	31,450	33,987
Commercial Health			
- Health Promotion Grant	28,296	23,953	0
ICT			
- Opportunities for People with Disabilities	3,500	1,500	1,500
Capital Schemes	79,000	20,000	20,000
TOTAL	210,214	148,052	85,010

7. Other Relevant Considerations

7.1 None relevant to this report.

8. Other Options Considered

8.1 To not report separately on the establishment costs in advance of the main budget considerations.

9. Appropriate Consultations

9.1 None.

10. Financial and Efficiency Implications

10.1 These are as set out in the body of the report.

11. Appendices to this report

11.1 Appendix A – Budgeted Establishment costs for 2008/10 and 2009/10

11.2 Appendix B – Number of FTE's for 2008/09 and 2009/10

12. List of Background Papers

12.1 None.

The following Officers/Members have been consulted (identified by ✓):

- ✓ Head of Paid Service
- ✓ S. 151 Officer
- ✓ Monitoring Officer
- ✓ Portfolio Holder (Cabinet Executive/Council reports only)

ESTABLISHMENT COSTS 2008/2009 REVISED AND 2009/2010 FIRST ESTIMATES.

APPENDIX A

	POSTS @ 01/04/09	FTE @ 01/04/09	2008/2009 ORIGINAL NET	2008/2009 REVISED	2008/2009 EXTERNAL FUNDING	2008/2009 REVISED NET	VARIANCE %
			A	B	C	D	D TO A
CHIEF EXECUTIVE	2	2.13	153,404	169,477		169,477	10.48%
DEPUTY CHIEF EXECUTIVE	2	2.08	128,091	135,624		135,624	5.88%
DIRECTOR OF OPERATIONS	2	1.89	115,671	115,267		115,267	-0.35%
DIRECTOR OF PERFORMANCE & PEOPLE	33	29.58	1,017,124	982,091		982,091	-3.44%
CORPORATE TRANSFORMATION MANAGER	37	32.90	930,783	925,743	-1,500	924,243	-0.70%
DEV & ASSETS GROUP MANAGER	43	37.00	1,451,770	1,219,808		1,219,808	-15.98%
FINANCIAL SERVICES GROUP MANAGER	30	27.97	824,999	815,379		815,379	-1.17%
HOUSING & COMMUNITY SERVICES GROUP MANAGER	35	34.63	734,160	895,501	-49,649	845,852	15.21%
ENVIRONMENTAL PROTECTION GROUP MANAGER	21	20.68	675,503	642,271		642,271	-4.92%
HEALTH & LEISURE GROUP MANAGER	19	18.22	329,441	564,816	-76,903	487,913	48.10%
NEIGHBOURHOOD SERVICES GROUP MANAGER	77	76.24	2,157,079	2,181,779	-52,963	2,128,815	-1.31%
CORPORATE HEAD OF POLICY & P/SHIPS	10	8.43	135,815	211,182		211,182	55.49%
TRAINEES	3	3.00	52,478	29,790		29,790	-43.23%
RETAINED HSG TO 03/11/08- TFR TO HSG COM SERVICES			308,045	128,352		128,352	-58.33%
FINANCE TUPE TFR TO 3 OAKS			85,163	48,320		48,320	-43.26%
CUSTOMER SERVICES TUPE TFR TO 3 OAKS			45,377	26,431		26,431	-41.75%
HSG TUPE TFR TO 3 OAKS			1,414,275	824,993		824,993	-41.67%
TOTAL	314	294.75	10,559,178	9,916,824	-181,015	9,735,809	-7.80%
CENTRAL PROVISIONS							
WORK PAY/COVER			25,000	25,000		25,000	0.00%
OCCUPATIONAL MATERNITY PAY			14,667	14,667		14,667	0.00%
GROSS STATUTORY MATERNITY PAY			48,004	48,004		48,004	0.00%
RECOVERABLE STAT. MATERNITY PAY			-44,164	-44,164		-44,164	0.00%
CORPORATE CONTINGENCY NEW SA RATES (inc in revised)			82,836	0		0	-100.00%
CORPORATE CONTINGENCY REDUNDANCY PAYMENTS			0	80,492		80,492	100.00%
CORPORATE CONTINGENCY SENIOR MANAGERS PRP			0	0		0	0.00%
CHILDCARE VOUCHER SCHEME			0	1,000		1,000	0.00%
OTHER							
NET TURNOVER SAVINGS RE VACANCIES			-160,000	-160,000		-160,000	0.00%
CAPITAL SCHEMES - DESIGN & SUPERVISION			-79,000		-20,000	-20,000	-74.68%
TOTAL	314	294.75	10,446,521	9,881,823	-201,015	9,680,808	-7.33%
							-765,713
TOTAL NET ESTABLISHMENT	314	294.75	10,446,521	9,881,823	-201,015	9,680,808	-765,713

2009/2010 FIRST +2.475%	2009/2010 EXTERNAL FUNDING	2009/2010 FIRST NET INC FRS17	VARIANCE %	VARIANCE %	NO OF INC
E	F	G	G TO A	G TO D	
158,564		158,564	3.36%	-6.44%	2
139,056		139,056	8.56%	2.53%	0
118,181		118,181	2.17%	2.53%	0
978,365		978,365	-3.81%	-0.38%	11
1,010,370	-1,500	1,008,870	8.39%	9.16%	19
1,133,120		1,133,120	-21.95%	-7.11%	21
811,496		811,496	-1.64%	-0.48%	14
982,634	-33,987	948,647	29.22%	12.15%	24
644,685		644,685	-4.56%	0.38%	10
646,612	-29,523	617,090	87.31%	26.48%	16
2,241,566	-54,175	2,187,391	1.41%	2.75%	37
325,140		325,140	139.40%	53.96%	5
50,278		50,278	-4.19%	68.77%	2
			-100.00%	-100.00%	
			-100.00%	-100.00%	
9,240,068	-119,185	9,120,884	-13.62%	-6.32%	161
25,000		25,000	0.00%	0.00%	
14,667		14,667	0.00%	0.00%	
48,004		48,004	0.00%	0.00%	
-44,164		-44,164	0.00%	0.00%	
0		0	0.00%	0.00%	
80,492		80,492	100.00%	100.00%	
0		0	0.00%	0.00%	
1,000		1,000	0.00%	0.00%	
3,000		3,000	0.00%	0.00%	
35,000		35,000	0.00%	0.00%	
3,000		3,000	0.00%	0.00%	
9,161,575	-139,185	9,022,391	-13.63%	-6.80%	
INCREASE (£)			-1,424,130	-658,417	
9,161,575	-139,185	9,022,391	-13.63%	-6.80%	
INCREASE (£)			-1,424,130	-658,417	

Note

8/9 ORIGINAL EXCLUDING TUPE POSTS TO 9/10 ORIGINAL BUDGET REDUCTION ANALYSIS

8/9 ORIGINAL BUDGET	10,446,521
LESS - TUPE POSTS ORIGINAL BUDGET AS ABOVE	85,163
	45,377
	<u>1,414,275</u>
	<u>1,544,815</u>
	<u>8,901,707</u>
8/9 ORIGINAL BUDGET EXCLUDING TUPE POSTS	8,901,707
9/10 ORIGINAL BUDGET	<u>9,022,391</u>
INCREASE IN NET BUDGET REQUIREMENT	<u>120,684</u> I.E. 1.36%

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Establishment 2009-2010 : Movement in Posts from September 2007 to April 2009

APPENDIX B

Note : excludes temporary posts which are externally funded for 2009/2010

Division	No. of Posts at Sep 2007	No. of FTEs at Sep 2007	Movement Posts	Movement FTEs	No. of Posts at April 2009	No. of FTEs at April 2009
Division						
Chief Executive	2	2.13			2.00	2.13
DCE	2	2.08			2.00	2.08
Strategic Director	2	1.89			2.00	1.89
Reprographics	2	1.39			2.00	1.39
Information Management	1	1.00			1.00	1.00
Secretariat	3	3.00	-3.00	-3.00	0.00	0.00
Democratic Services	7	5.78			7.00	5.78
Licensing	3	3.00		0.04	3.00	3.04
Legal Services	2	2.00	2.00	2.00	4.00	4.00
Land Charges	2	1.68			2.00	1.68
Environmental Service Operations	7	7.12	-4.00	-4.10	3.00	3.02
N/Hood Services Group Manager	0	0.00	2.00	2.00	2.00	2.00
Cleansing	9	9.00	1.00	0.22	10.00	9.22
Refuse & Recycling	45	45.00	4.00	4.00	49.00	49.00
Vehicle Maintenance	4	4.00			4.00	4.00
Head of Policy & P/Ships	3	3.00	1.00	0.00	4.00	3.00
Leisure Development Arts	0	0.00	1.00	0.57	1.00	0.57
Community Development	10	9.42	-5.00	-4.38	5.00	5.04
The Pavilion	0	0.00	3.00	3.00	3.00	3.00
Crime & Disorder	2	1.81	-2.00	-1.81	0.00	0.00
Physical Activity Officers	0	0.00	1.00	1.00	1.00	1.00
GNDs Maint/ open Spaces	7	7.00			7.00	7.00
Highways Cyclic Maint	2	2.00			2.00	2.00
Civics	1	0.68		0.32	1.00	1.00
Communications	2	2.00			2.00	2.00
Human Resources	6	5.23	2.00	1.08	8.00	6.31
Head of Performance & Org Dev	3	2.81	-1.00	-0.81	2.00	2.00
Corporate Performance	3	3.00	1.00	1.00	4.00	4.00
Scrutiny	2	2.00			2.00	2.00
Benefits	17	16.05	2.00	2.54	19.00	18.59
Corporate Transformation Manager	2	2.00	-1.00	-1.00	1.00	1.00
Revenues	20	17.93	-3.00	-2.54	17.00	15.39
Customer Systems	0	0.00	5.00	4.45	5.00	4.45
Environmental Health Support	9	9.00	-5.00	-5.00	4.00	4.00
Financial Services Group Manager	0	0.00	2.00	2.00	2.00	2.00
Finance	13	12.57	-2.00	-2.00	11.00	10.57
Finance - TUPE 3 OAKS	3	3.00	-3.00	-3.00	0.00	0.00
Housing * Comm Service Grp Man	0	0.00	1.00	1.00	1.00	1.00
Audit	4	3.81	-1.00	-1.00	3.00	2.81
Homelessness	0	0.00			0.00	0.00
Housing RETAINED Private Sector	4	4.00			4.00	4.00
Housing RETAINED Strategy			1.00	1.00	1.00	1.00
Housing RETAINED -Options	5	5.00			5.00	5.00
Housing - TUPE 3 OAKS	14	13.93	-14.00	-13.93	0.00	0.00
Wardens - TUPE 3 OAKS	14	11.77	-14.00	-11.77	0.00	0.00
Cleaners - TUPE 3 OAKS	8	1.77	-8.00	-1.77	0.00	0.00
Building Maintenance	23	23.00	-23.00	-23.00	0.00	0.00
Environmental Strategy	0	0.00	2.00	2.00	2.00	2.00
Health Promotion	0	0.00	1.00	1.00	1.00	1.00
Environmental Protection Grp Man	0	0.00	1.00	1.00	1.00	1.00
Technical Services	0	0.00	5.00	5.00	5.00	5.00
Environmental Protection	12	12.00	-6.00	-6.60	6.00	5.40
Health & Leisure Group Manager	0	0.00	2.00	2.00	2.00	2.00
Commercial Health	8	7.49	-3.00	-2.88	5.00	4.61
Control Of Dogs	0	0.00	2.00	2.00	2.00	2.00
Countryside Recreation Areas	0	0.00	1.00	1.00	1.00	1.00
Dev & Assesst Group Manager	0	0.00	2.00	2.00	2.00	2.00
Building Control	9	9.00	-1.00	-1.00	8.00	8.00
Property Service	3	3.00		-0.19	3.00	2.81
Cleaners/ Caretakers	9	4.11	-1.00	-0.19	8.00	3.92
Head Of Planning & Environ Services	2	2.00	-2.00	-2.00	0.00	0.00
External Funding & Grants	0	0.00	1.00	0.81	1.00	0.81
Development Control	0	0.00	15.00	14.81	15.00	14.81
Planning Enforcement	0	0.00	3.00	3.28	3.00	3.28
Planning Policy	0	0.00	6.00	5.43	6.00	5.43
Planning Admin	30	27.86	-24.00	-23.20	6.00	4.66
Customer Services	17	14.06			17.00	14.06
Customer Services - TUPE 3 OAKS	3	2.00	-3.00	-2.00	0.00	0.00
ITC	10	10.00	-1.00	-1.00	9.00	9.00
Trainees	3	3.00			3.00	3.00
	374	346.37	-60.00	-51.62	314.00	294.75
					-60.00	-51.62

Notes

TUPE TFR to 3 Oaks	-65.00	-55.47
Net Additional posts	5.00	3.85
	-60.00	-51.62

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