



Jacqui Sinnott-Lacey
Chief Operating Officer

52 Derby Street
Ormskirk
West Lancashire
L39 2DF

Monday 16 January 2023

**TO: COUNCILLORS Y GAGEN, G DOWLING, C COUGHLAN, V CUMMINS,
A FENNELL, N PRYCE-ROBERTS, J WILKIE AND A YATES**

Dear Councillor,

A meeting of the **CABINET** will be held in the **CABINET/COMMITTEE ROOM, 52 DERBY STREET, ORMSKIRK L39 2DF** on **TUESDAY, 24 JANUARY 2023** at **7.00 PM** at which your attendance is requested.

Yours faithfully

A handwritten signature in black ink, appearing to be 'JS', written over a circular scribble.

Jacqui Sinnott-Lacey
Chief Operating Officer

AGENDA
(Open to the Public)

- 1. APOLOGIES**
- 2. SPECIAL URGENCY (RULE 16 ACCESS TO INFORMATION PROCEDURE RULES)/URGENT BUSINESS**

If, by virtue of the date by which a decision must be taken, it has not been possible to follow Rule 15 (i.e. a matter which is likely to be the subject of a key decision has not been included on the Forward Plan) then the decision may still be taken if:

- a) The Chief Operating Officer, on behalf of the Leader, obtains the

agreement of the Chairman of the Executive Overview and Scrutiny Committee that the making of the decision cannot be reasonably deferred,

- b) The Chief Operating Officer, on behalf of the Leader, makes available on the Council's website and at the offices of the Council, a notice setting out the reasons that the decision is urgent and cannot reasonably be deferred.

- 3. PUBLIC SPEAKING** 643 - 648
- Residents of West Lancashire on giving notice, may address the meeting to make representations on any item on the agenda except where the public and press are to be excluded during consideration of the item. The deadline for submissions is 10.00am on Friday 20 January 2023 . A copy of the public speaking protocol and form to be completed is attached.
- 4. DECLARATIONS OF INTEREST** 649 - 650
- If a member requires advice on Declarations of Interest, he/she is advised to contact the Legal and Democratic Services Manager in advance of the meeting. (For the assistance of members a checklist for use in considering their position on any particular item is included at the end of this agenda sheet.)
- 5. MINUTES** 651 - 656
- To receive as a correct record, the minutes of the meeting of Cabinet held on Tuesday 15 November 2022.
- 6. MATTERS REQUIRING DECISIONS**
- 6a Draft Decant Policy** 657 - 672
To consider the report of the Corporate Director of Transformation, Housing & Resources.
(Relevant Portfolio Holder: Councillor N Pryce-Roberts)
- 6b Draft Housing Allocations Policy** 673 - 728
To consider the report of the Corporate Director of Transformation, Housing & Resources.
(Relevant Portfolio Holder: Councillor N Pryce-Roberts)
- 6c Draft Garage Allocations & Management Policy** 729 - 744
To consider the report of the Corporate Director of Transformation, Housing and Resources.
(Relevant Portfolio Holder: Councillor N Pryce-Roberts)
- 6d Draft GRA Budget Report and MTFs Update 23-24** TO FOLLOW
To consider the report of the Head of Finance, Procurement & Commercial Services.
(Relevant Portfolio Holder: Councillor A Yates)

- | | | |
|----|--|--------------|
| 6e | Draft Capital Strategy Report 23-24
To consider the report of the Head of Finance, Procurement & Commercial Services.
(Relevant Portfolio Holder: Councillor A Yates) | TO
FOLLOW |
| 6f | Draft GRA Capital Programme 23-24 - 25-26
To consider the report of the Head of Finance, Procurement & Commercial Services.
(Relevant Portfolio Holder: Councillor A Yates) | TO
FOLLOW |
| 6g | Draft Treasury Management Strategy 23-24
To consider the report of the Head of Finance, Procurement & Commercial Services.
(Relevant Portfolio Holder: Councillor A Yates) | TO
FOLLOW |
| 6h | Climate Change Strategy And Action Plan 2030: Progress Update, Achievements And 2023/24 Priorities
To consider the report of the Corporate Director of Place & Community.
(Relevant Portfolio Holder: Councillor J Wilkie) | 745 -
758 |
| 6i | Recommendations from Community Environmental Improvements, Including Community Orchards, Task & Finish Group
To consider the report of the Corporate Director of Place & Community, & Legal & Democratic Services Manager.
(Relevant Portfolio Holders: Councillors J Wilkie, C Coughlan & V Cummins) | 759 -
776 |
| 6j | The Council Performance Delivery Plan 2022/23
To consider the report of the Corporate Director of Transformation, Housing & Resources.
(Relevant Portfolio Holder: Councillor A Yates) | 777 -
800 |
| 6k | Voluntary Sector Grants
To consider the report of the Corporate Director of Transformation, Housing & Resources.
(Relevant Portfolio Holder: Councillor G Dowling) | TO
FOLLOW |

7. EXCLUSION OF PRESS AND PUBLIC

It is recommended that members of the press and public be excluded from the meeting during consideration of the following items of business in accordance with Section 100A(4) of the Local Government Act 1972 on the grounds that they involve the likely disclosure of exempt information as defined in paragraph 3 of Part 1 of Schedule 12A to the Act and as, in all the circumstances of the case the public interest in maintaining the exemption under Schedule 12A outweighs the public interest in disclosing the information.

PART 2 - NOT OPEN TO THE PUBLIC

8. MATTERS REQUIRING DECISIONS

- | | | |
|----|--|--------------|
| 8a | DRAFT HRA Budget Report 23-24
To consider the report of the Corporate Director of Transformation,
Housing & Resources.
(Relevant Portfolio Holder: Councillor N Pryce-Roberts) | 801 -
816 |
| 8b | A Corporate Strategy for The Management Of General Revenue
Account (GRA) Property Assets
To consider the report of the Corporate Director Transformation,
Housing and Resources.
(Relevant Portfolio Holder: Councillor A Yates) | 817 -
842 |
| 8c | Leisure Management Procurement
To consider the report of the Corporate Director of Place & Community.
(Relevant Portfolio Holder: Councillor C Coughlan) | 843 -
864 |

We can provide this document, upon request, on audiotape, in large print, in Braille and in other languages.

FIRE EVACUATION PROCEDURE: Please see attached sheet.

MOBILE PHONES: These should be switched off or to 'silent' at all meetings.

For further information, please contact:

Jacky Denning on 01695 585384

Or email jacky.denning@westlancs.gov.uk

**FIRE EVACUATION PROCEDURE FOR:
COUNCIL MEETINGS WHERE OFFICERS ARE PRESENT
(52 DERBY STREET, ORMSKIRK)**

PERSON IN CHARGE: Most Senior Officer Present
ZONE WARDEN: Member Services Officer / Lawyer
DOOR WARDEN(S) Usher / Caretaker

IF YOU DISCOVER A FIRE

1. Operate the nearest **FIRE CALL POINT** by breaking the glass.
2. Attack the fire with the extinguishers provided only if you have been trained and it is safe to do so. **Do not** take risks.

ON HEARING THE FIRE ALARM

1. Leave the building via the **NEAREST SAFE EXIT**. **Do not stop** to collect personal belongings.
2. Proceed to the **ASSEMBLY POINT** on the car park and report your presence to the **PERSON IN CHARGE**.
3. **Do NOT** return to the premises until authorised to do so by the **PERSON IN CHARGE**.

NOTES:

Officers are required to direct all visitors regarding these procedures i.e. exit routes and place of assembly.

The only persons not required to report to the Assembly Point are the Door Wardens.

CHECKLIST FOR PERSON IN CHARGE

1. Advise other interested parties present that you are the person in charge in the event of an evacuation.
2. Make yourself familiar with the location of the fire escape routes and inform any interested parties of the escape routes.
3. Make yourself familiar with the location of the assembly point and inform any interested parties of that location.
4. Make yourself familiar with the location of the fire alarm and detection control panel.
5. Ensure that the zone warden and door wardens are aware of their roles and responsibilities.
6. Arrange for a register of attendance to be completed (if considered appropriate / practicable).

IN THE EVENT OF A FIRE, OR THE FIRE ALARM BEING SOUNDED

1. Ensure that the room in which the meeting is being held is cleared of all persons.
2. Evacuate via the nearest safe Fire Exit and proceed to the **ASSEMBLY POINT** in the car park.
3. Delegate a person at the **ASSEMBLY POINT** who will proceed to **HOME CARE LINK** in order to ensure that a back-up call is made to the **FIRE BRIGADE**.
4. Delegate another person to ensure that **DOOR WARDENS** have been posted outside the relevant Fire Exit Doors.

5. Ensure that the **ZONE WARDEN** has reported to you on the results of his checks, **i.e.** that the rooms in use have been cleared of all persons.
6. If an Attendance Register has been taken, take a **ROLL CALL**.
7. Report the results of these checks to the Fire and Rescue Service on arrival and inform them of the location of the **FIRE ALARM CONTROL PANEL**.
8. Authorise return to the building only when it is cleared to do so by the **FIRE AND RESCUE SERVICE OFFICER IN CHARGE**. Inform the **DOOR WARDENS** to allow re-entry to the building.

NOTE:

The Fire Alarm system will automatically call the Fire Brigade. The purpose of the 999 back-up call is to meet a requirement of the Fire Precautions Act to supplement the automatic call.

CHECKLIST FOR ZONE WARDEN

1. Carry out a physical check of the rooms being used for the meeting, including adjacent toilets, kitchen.
2. Ensure that **ALL PERSONS**, both officers and members of the public are made aware of the **FIRE ALERT**.
3. Ensure that **ALL PERSONS** evacuate **IMMEDIATELY**, in accordance with the **FIRE EVACUATION PROCEDURE**.
4. Proceed to the **ASSEMBLY POINT** and report to the **PERSON IN CHARGE** that the rooms within your control have been cleared.
5. Assist the **PERSON IN CHARGE** to discharge their duties.

It is desirable that the **ZONE WARDEN** should be an **OFFICER** who is normally based in this building and is familiar with the layout of the rooms to be checked.

INSTRUCTIONS FOR DOOR WARDENS

1. Stand outside the **FIRE EXIT DOOR(S)**
2. Keep the **FIRE EXIT DOOR SHUT**.
3. Ensure that **NO PERSON**, whether staff or public enters the building until **YOU** are told by the **PERSON IN CHARGE** that it is safe to do so.
4. If anyone attempts to enter the premises, report this to the **PERSON IN CHARGE**.
5. Do not leave the door **UNATTENDED**.

PUBLIC SPEAKING – PROTOCOL

(For meetings of Cabinet, Overview & Scrutiny Committees, Audit & Governance Committee and Standards Committee)

1.0 Public Speaking

- 1.1 Residents of West Lancashire may, on giving notice, address any of the above meetings to make representations on any item on the agenda for those meetings, except where the public and press are to be excluded from the meeting during consideration of the item.
- 1.2 A Parish Council Representative may, on giving notice, address any of the above meetings to make representations on any item on the agenda for those meetings, except where the public and press are to be excluded from the meeting during consideration of the item.
- 1.3 The form attached as an Appendix to this Protocol should be used for submitting requests.

2.0 Deadline for submission

- 2.1 The prescribed form should be received by Member Services by 10.00 am on the Friday of the week preceding the meeting. This can be submitted by e-mail to member.services@westlancs.gov.uk or by sending to:

Member Services
West Lancashire Borough Council
52 Derby Street
Ormskirk
West Lancashire
L39 2DF

- 2.2 Completed forms will be collated by Member Services and circulated via e-mail to relevant Members and officers and published on the Council website via Modgov. Only the name of the speaker (and representative) and details of the issue to be raised will be published.
- 2.3 Groups of persons with similar views should elect a spokesperson to speak on their behalf to avoid undue repetition of similar points. Spokespersons should identify in writing on whose behalf they are speaking.

3.0 Scope

- 3.1 Any matters raised must be relevant to an item on the agenda for the meeting.
- 3.2 The Legal & Democratic Services Manager may reject a submission if it:
 - (i) is defamatory, frivolous or offensive;
 - (ii) is substantially the same as representations which have already been submitted at a previous meeting; or

- (iii) discloses or requires the disclosure of confidential or exempt information.

4.0 Number of items

- 4.1 A maximum of one form per resident will be accepted for each Agenda Item.
- 4.2 There will be a maximum of 10 speakers per meeting. Where there are more than 10 forms submitted by residents, the Legal & Democratic Services Manager will prioritise the list of those allowed to speak. This will be considered having regard to all relevant matters including:
 - a. The order in which forms were received.
 - b. If one resident has asked to speak on a number of items, priority will be given to other residents who also wish to speak
 - c. Whether a request has been submitted in relation to the same issue.

No amendments will be made to the list of speakers once it has been compiled (regardless of withdrawal of a request to speak).

- 4.3 All submissions received will be published on the Council's website and circulated to Members of the relevant body and officers for consideration.

5.0 At the Meeting

- 5.1 Speakers will be shown to their seats. At the commencement of consideration of each agenda item the Leader/Chairman will invite the speakers to make their representations. Speakers will have up to 3 minutes to address the meeting. The address must reflect the issue included on the prescribed form submitted in advance.
- 5.2 Members may discuss what the speaker/s have said, along with any other information/representations submitted under this protocol, when all speakers on that item have finished and will then make a decision. Speakers should not circulate any supporting documentation at the meeting and should not enter into a debate with Councillors.
- 5.4 If residents feel nervous or uncomfortable speaking in public, then they can ask someone else to do it for them, including a Parish or Borough Councillor representative. They can also bring an interpreter if they need one. They should be aware there may be others speaking as well.

(Note: If a Resident wishes to have their Borough Councillor speak on their behalf, the Borough Councillor is not a member of the body considering the item.)

5.5 Speakers may leave the meeting at any time, taking care not to disturb the meeting.

(Please see attached form.)



REQUEST FOR PUBLIC SPEAKING AT MEETINGS

MEETING & DATE

NAME

ADDRESS

Post Code

PHONE

Email

Please indicate if you will be in attendance at the meeting

YES/NO*

*delete as applicable

Please indicate if someone will be speaking on your behalf at the meeting

YES/NO*

*delete as applicable

If someone is speaking on your behalf please provide their contact details:

NAME

PHONE

Email

Note: This page will not be published.

(P.T.O.)

Agenda Item 4

MEMBERS INTERESTS 2012

A Member with a disclosable pecuniary interest in any matter considered at a meeting must disclose the interest to the meeting at which they are present, except where it has been entered on the Register.

A Member with a non pecuniary or pecuniary interest in any business of the Council must disclose the existence and nature of that interest at commencement of consideration or when the interest becomes apparent.

Where sensitive information relating to an interest is not registered in the register, you must indicate that you have an interest, but need not disclose the sensitive information.

Please tick relevant boxes

Notes

	General		Notes
1.	I have a disclosable pecuniary interest.	<input type="checkbox"/>	<i>You cannot speak or vote and must withdraw unless you have also ticked 5 below</i>
2.	I have a non-pecuniary interest.	<input type="checkbox"/>	<i>You may speak and vote</i>
3.	I have a pecuniary interest because it affects my financial position or the financial position of a connected person or, a body described in 10.1(1)(i) and (ii) and the interest is one which a member of the public with knowledge of the relevant facts, would reasonably regard as so significant that it is likely to prejudice my judgement of the public interest or it relates to the determining of any approval consent, licence, permission or registration in relation to me or a connected person or, a body described in 10.1(1)(i) and (ii) and the interest is one which a member of the public with knowledge of the relevant facts, would reasonably regard as so significant that it is likely to prejudice my judgement of the public interest	<input type="checkbox"/> <input type="checkbox"/>	<i>You cannot speak or vote and must withdraw unless you have also ticked 5 or 6 below</i> <i>You cannot speak or vote and must withdraw unless you have also ticked 5 or 6 below</i>
4.	I have a disclosable pecuniary interest (Dispensation 20/09/16) or a pecuniary interest but it relates to the functions of my Council in respect of: (i) Housing where I am a tenant of the Council, and those functions do not relate particularly to my tenancy or lease. (ii) school meals, or school transport and travelling expenses where I am a parent or guardian of a child in full time education, or are a parent governor of a school, and it does not relate particularly to the school which the child attends. (iii) Statutory sick pay where I am in receipt or entitled to receipt of such pay. (iv) An allowance, payment or indemnity given to Members (v) Any ceremonial honour given to Members (vi) Setting Council tax or a precept under the LGFA 1992	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i> <i>You may speak and vote</i>
5.	A Standards Committee dispensation applies (relevant lines in the budget – Dispensation 15/09/20 – 14/09/24)	<input type="checkbox"/>	<i>See the terms of the dispensation</i>
6.	I have a pecuniary interest in the business but I can attend to make representations, answer questions or give evidence as the public are also allowed to attend the meeting for the same purpose	<input type="checkbox"/>	<i>You may speak but must leave the room once you have finished and cannot vote</i>

'disclosable pecuniary interest' (DPI) means an interest of a description specified below which is your interest, your spouse's or civil partner's or the interest of somebody who you are living with as a husband or wife, or as if you were civil partners and you are aware that that other person has the interest.

Interest

Employment, office, trade, profession or vocation

Sponsorship

Prescribed description

Any employment, office, trade, profession or vocation carried on for profit or gain.

Any payment or provision of any other financial benefit (other than from the relevant authority) made or provided within the relevant period in respect of any expenses incurred by M in carrying out duties as a member, or towards the election expenses of M.

	This includes any payment or financial benefit from a trade union within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992.
Contracts	Any contract which is made between the relevant person (or a body in which the relevant person has a beneficial interest) and the relevant authority— (a) under which goods or services are to be provided or works are to be executed; and (b) which has not been fully discharged.
Land	Any beneficial interest in land which is within the area of the relevant authority.
Licences	Any licence (alone or jointly with others) to occupy land in the area of the relevant authority for a month or longer.
Corporate tenancies	Any tenancy where (to M's knowledge)— (a) the landlord is the relevant authority; and (b) the tenant is a body in which the relevant person has a beneficial interest.
Securities	Any beneficial interest in securities of a body where— (a) that body (to M's knowledge) has a place of business or land in the area of the relevant authority; and (b) either— (i) the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body; or (ii) if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which the relevant person has a beneficial interest exceeds one hundredth of the total issued share capital of that class.

"body in which the relevant person has a beneficial interest" means a firm in which the relevant person is a partner or a body corporate of which the relevant person is a director, or in the securities of which the relevant person has a beneficial interest; "director" includes a member of the committee of management of an industrial and provident society;

"land" excludes an easement, servitude, interest or right in or over land which does not carry with it a right for the relevant person (alone or jointly with another) to occupy the land or to receive income; "M" means a member of a relevant authority;

"member" includes a co-opted member; "relevant authority" means the authority of which M is a member;

"relevant period" means the period of 12 months ending with the day on which M gives notice to the Monitoring Officer of a DPI;

"relevant person" means M or M's spouse or civil partner, a person with whom M is living as husband or wife or a person with whom M is living as if they were civil partners;

"securities" means shares, debentures, debenture stock, loan stock, bonds, units of a collective investment scheme within the meaning of the Financial Services and Markets Act 2000 and other securities of any description, other than money deposited with a building society.

'non pecuniary interest' means interests falling within the following descriptions:

- 10.1(1)(i) Any body of which you are a member or in a position of general control or management and to which you are appointed or nominated by your authority;
- (ii) Any body (a) exercising functions of a public nature; (b) directed to charitable purposes; or (c) one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union), of which you are a member or in a position of general control or management;
- (iii) Any easement, servitude, interest or right in or over land which does not carry with it a right for you (alone or jointly with another) to occupy the land or to receive income.
- 10.2(2) A decision in relation to that business might reasonably be regarded as affecting your well-being or financial position or the well-being or financial position of a connected person to a greater extent than the majority of other council tax payers, ratepayers or inhabitants of the ward, as the case may be, affected by the decision.

'a connected person' means

- (a) a member of your family or any person with whom you have a close association, or
- (b) any person or body who employs or has appointed such persons, any firm in which they are a partner, or any company of which they are directors;
- (c) any person or body in whom such persons have a beneficial interest in a class of securities exceeding the nominal value of £25,000; or
- (d) any body of a type described in sub-paragraph 10.1(1)(i) or (ii).

'body exercising functions of a public nature' means

Regional and local development agencies, other government agencies, other Councils, public health bodies, council-owned companies exercising public functions, arms length management organisations carrying out housing functions on behalf of your authority, school governing bodies.

A Member with a personal interest who has made an executive decision in relation to that matter must ensure any written statement of that decision records the existence and nature of that interest.

NB Section 21(13) of the LGA 2000 overrides any Code provisions to oblige an executive member to attend an overview and scrutiny meeting to answer questions.

Agenda Item 5

CABINET

HELD: Tuesday, 15 November 2022
Start: 7.00 pm
Finish: 7.10 pm

PRESENT:

Councillors:

Portfolio

Councillor Yvonne Gagen	Leader of the Council
Councillor Gareth Dowling	Deputy Leader and Portfolio Holder for Communities and Community Safety. Dementia Champion and Food Security Champion
Councillor Carl Coughlan	Portfolio Holder for Leisure; and Youth Champion
Councillor Vickie Cummins	Portfolio Holder for Health & Wellbeing
Councillor Anne Mary Fennell	Portfolio Holder for Planning
Councillor Nicola Pryce-Roberts	Portfolio Holder for Housing

In attendance: Councillors

David Westley and Adrian Owens (Virtual)

Officers:

Jacqui Sinnott-Lacey, Chief Operating Officer
Heidi McDougall, Corporate Director of Place & Community
Chris Twomey, Corporate Director of Housing, Transformation & Resources
James Pierce, Head of Finance, Procurement and Commercial Services
Simon Kirby, Head of Wellbeing & Place Services (Virtual)
Lisa Windle, Head of Corporate & Customer Services (Virtual)
Jacky Denning, Democratic Services Manager
Claire Kelly, Principal Solicitor and Deputy Monitoring Officer
Jonathan Mitchell, Housing Strategy & Development Programme Manager
Elizabeth Morgan - Digital Communications Manager (Virtual)

34 APOLOGIES

There were no apologies for absence.

35 SPECIAL URGENCY (RULE 16 ACCESS TO INFORMATION PROCEDURE RULES)/URGENT BUSINESS

There were no items of special urgency.

36 PUBLIC SPEAKING

There were no items under this heading.

37 DECLARATIONS OF INTEREST

There were no declarations of interests received.

38 MINUTES

RESOLVED: That the minutes of the Cabinet meeting held on 13 September 2022 be received as a correct record and signed by the Leader.

39 MATTERS REQUIRING DECISIONS

Consideration was given to the following matters requiring decisions and contained on pages 367 to 508 and 613 to 640 of the Book of Reports.

40 2022/23 QUARTER 2 GRA REVENUE MONITORING

The Leader, Councillor Gagen introduced the report of the Head of Finance, Procurement & Commercial Services, which provided a summary of the General Revenue Account (GRA) position for the 2022/23 financial year at quarter 2 and sought approval of the budget amendments set out in the report.

The Minutes of the Budget/Council Plan and the Executive Overview & Scrutiny Committees had been circulated prior to the meeting.

In reaching the decision below, the Cabinet considered the report before it and the recommendations contained therein.

RESOLVED: That the 2022/23 GRA position be noted, and the budget amendments reported be endorsed.

41 2022/23 QUARTER 2 GRA CAPITAL MONITORING

The Leader introduced the report of the Head of Finance, Procurement & Commercial Services, which provided the Revised General Revenue Account (GRA) Capital Programme for 2022/23 and an update on the progress of capital schemes at quarter 2.

The Minutes of the Budget/Council Plan and the Executive Overview & Scrutiny Committees had been circulated prior to the meeting.

In reaching the decision below, the Cabinet considered the report before it and the recommendations contained therein.

RESOLVED: A. That the revised Capital Programme for 2022/23 of £12.147m, including the re-profiling, virements and budget adjustments

contained within Appendix A, be noted and endorsed.

- B. That the 2022/23 budget additions of £1.800m to the 2022/23 budget and £296k 2023/24 budget, to existing schemes within the approved programme, contained in Appendix A for approval by Council in December 2022, be noted and endorsed.
- C. That the progress against the Revised Capital Programme at Quarter 2 be noted.

42 **22/23 QUARTER 2 HRA REVENUE AND CAPITAL MONITORING**

The Leader and Councillor Pryce-Roberts introduced the report of the Head of Finance, Procurement & Commercial Services, which provided a summary of the Housing Revenue Account (HRA) and Housing capital programme positions for the 2022/23 financial year.

The Minutes of the Budget/Council Plan and the Executive Overview & Scrutiny Committees and the Landlord Services Committee (Cabinet Working Group), together with some additional information revising paragraphs 10.1 and 10.2 of the report, had been circulated prior to the meeting.

In reaching the decision below, the Cabinet considered the report before it and the recommendations contained therein, including the additional information circulated prior to the meeting.

- RESOLVED:
- A. That the 2022/23 HRA and Housing capital programme positions be noted.
 - B. That the proposed budget adjustments identified in section 7 and the revised paragraph 10.1 of the report be endorsed.

43 **22/23 TM MID-YEAR PRUDENTIAL INDICATORS**

The Leader introduced the report of the Head of Finance, Procurement & Commercial Services, which detailed the Treasury Management operations for the first half of 2022/23 and reported on the Prudential Indicators, where available.

The Minutes of the Budget/Council Plan and the Executive Overview & Scrutiny Committees had been circulated prior to the meeting.

In reaching the decision below, the Cabinet considered the report before it and the recommendations contained therein.

- RESOLVED:
- A. That the Treasury Management activity and Prudential Indicator performance for the first quarter of 2022/23 be noted.
 - B. That the changes to the Prudential Indicators highlighted in

section 7 for approval by Council in December 2022, be noted and endorsed.

44 RESULTS OF CITIZEN SURVEY 2022

The Leader introduced the report of the Corporate Director of Transformation, Housing & Resources, which detailed the results of the Citizen Survey 2022.

The Minute of the Executive Overview & Scrutiny Committee had been circulated prior to the meeting.

In reaching the decision below, the Cabinet considered the report before it and the recommendations contained therein.

- RESOLVED: A. That the results of the Citizens Survey, attached as an Appendix, be noted, and the main results reports be published on the Council website and submitted to the Local Government Association (LGA).
- B. That the proposals for future actions set out in Section 7 of the report be endorsed.

45 HOUSING STRATEGY

Councillor Pryce-Roberts introduced the report of the Corporate Director Transformation, Housing and Resources, which provided an update about the Councils Housing Strategy and sought endorsement of the Housing Strategy vision and delivery objectives.

The minutes of the Executive Overview & Scrutiny Committee and the Landlord Services Committee (Cabinet Working Group) had been circulated prior to the meeting.

In reaching the decision below, the Cabinet considered the report before it and the recommendations contained therein.

- RESOLVED: A. That the current position as it relates to the development of an updated Housing Strategy be noted.
- B. That the use of the Housing Strategy vision and delivery objectives, as shown in Section 6 of the report, until March 2024, be endorsed.

46 EXCLUSION OF PRESS AND PUBLIC

RESOLVED: That under Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting during consideration

of the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in paragraph 3 (financial/business affairs) of Part 1 of Schedule 12A of that Act and as, in all the circumstances of the case, the public interest in maintaining the exemption under Schedule 12A outweighs the public interest in disclosing the information.

(Note: No representations had been received in relation to the following item being considered in private)

47 **MATTERS REQUIRING DECISIONS**

Consideration was given to reports on the following matters requiring decisions and contained on pages 509 to 612 and 641 to 642 of the Book of Reports:

48 **BEACON GOLF COURSE AND PARK**

Councillor Coughlan introduced the report of the Corporate Director of Place & Community, which provided a report from external consultants in relation to the future of Beacon Golf Course and set out options and cost implications in respect of the future operation of the golf course and associated buildings. Consideration was also given to the additional information circulated with the report in respect of Option F and the minute and recommendation of the Leisure Procurement Committee.

In reaching the decision below, Cabinet considered the report before it, the additional information in respect of Option F and the minute and recommendation of the Leisure Procurement Committee.

RESOLVED: That the recommendations to Council set out at paragraph 4 of the report be approved.

49 **UPDATE ON HOUSING REPAIRS SERVICE**

Councillor Pryce-Roberts introduced the report of the Corporate Director of Transformation, Housing & Resources, which provided an update on the repairs contract and sought approval of proposed amendments.

The minute of the Executive Overview & Scrutiny Committee had been circulated prior to the meeting.

In reaching the decision below, Cabinet considered the report before it and the recommendations contained therein.

RESOLVED: That the recommendations to Council set out at paragraph 4 of the report be approved.

CABINET

HELD: Tuesday, 15 November 2022

.....
Leader



LSC: 18th January 2023

CABINET: 24th January 2023

EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
12th January 2023

Report of: Corporate Director of Transformation, Housing & Resources

Relevant Portfolio Holder: Councillor Pryce-Roberts

Contact for further information: Nicola Bradley (Ext. 5296)
(E-mail: nicola.bradley@westlancs.gov.uk)

SUBJECT: DRAFT DECANT POLICY

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To consider and agree the Decant Policy

2.0 RECOMMENDATIONS TO CABINET

2.1 That the Decant Policy attached at Appendix 1 of the report be approved

2.2 That the Head of Housing, in consultation with the relevant Portfolio Holder, be given delegated authority to make minor updates and changes as required to this policy.

3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW & SCRUTINY COMMITTEE

3.1 That the contents of the policy be considered by the committee.

4.0 BACKGROUND

4.1 The Council on occasion needs to ask tenants to move from their home so that improvements, repairs or redevelopment can take place. This is known as decanting. Tenants may need to move out of their homes on a temporary or permanent basis.

4.2 Whilst there is no statutory requirement to produce a Decant Policy, a written Policy will allow future decants to be undertaken in a transparent and consistent manner with the focus being on supporting the tenant.

4.3 Decanting can be very difficult and stressful for a family household and having a clearly stated policy for reference will help officers to manage the process in such a way as to minimise disruption and to manage the expectations of the various people involved

5.0 AIMS OF THE POLICY

5.1 The aim of the draft policy is to:

- develop a consistent approach to the management of decants
- set out the assistance offered to our tenants affected by decant situations
- cause the least possible disturbance to tenants who must decant on either a temporary or permanent basis, by assisting them in the moving process,
- ensure that information, and support is provided throughout the process;
- make reasonable and prompt payments or assistance to those affected, complying with statutory and regulatory requirements.

6.0 SUSTAINABILITY IMPLICATIONS

6.1 This Policy formalises our approach to supporting tenants who need to move out of their homes on a temporary or permanent basis, which allows the Council to undertake essential work or regenerate areas to ensure we provide good quality homes.

7.0 FINANCIAL AND RESOURCE IMPLICATIONS

7.1 The financial impact of paying Home Loss and associated Disturbance Payments will be considered as part of the viability of any undertaken works or redevelopment schemes.

8.0 RISK ASSESSMENT

8.1 The actions referred to in this report are covered by the scheme of delegation to officers and any necessary changes have been made in the relevant risk registers.

9.0 HEALTH AND WELLBEING IMPLICATIONS

9.1 The Policy aims to promote the wellbeing of our tenants by providing help and support to those needing to be decanted from their homes.

Background Documents

*There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

* There is a direct impact on members of the public, employees, elected members and / or stakeholders, therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained within this report

Appendices

1. Draft Decant Policy
2. Equality Impact Assessment

WEST LANCASHIRE BOROUGH COUNCIL

DECANT POLICY



December 2022

Introduction

The Decant Policy outlines West Lancashire Borough Council's approach to supporting tenants who need to move out of their homes on a temporary or permanent basis, due to an emergency or, where planned major works cannot be undertaken with the tenant in residence, or as the result of redevelopment/demolition.

We recognise that moving home particularly when it is not a matter of choice can be disruptive and upsetting, we will therefore ensure that:

- Where possible, we will carry out works whilst the tenant remains in their home. However, there will be certain situations when this is not possible.
- Tenants are consulted about decants and provided with information regarding the nature of the works needed to their home and the timescales involved.
- We give as much notice as possible for tenants to move.
- We assess the households needs to identify suitable alternative accommodation, which may be on a temporary or permanent basis.
- We comply with the Land Compensation Act 1973 (as amended) when making home loss and disturbance payments.
- We compensate tenants for all reasonable costs

Objectives

The purpose of this policy is to ensure we treat all customers in a fair and consistent manner and to provide clarity on the arrangements which will take place when a customer has to move out of their home on a temporary or permanent basis.

The objectives of the policy are to:

- develop a consistent approach to the management of decants
- set out the assistance offered to our tenants affected by decant situations
- cause the least possible disturbance to tenants who have to decant on either a temporary or permanent basis, by assisting them in the moving process,
- ensure that information, and support is provided throughout the process;
- make reasonable and prompt payments or assistance to those affected, complying with statutory and regulatory requirements.

Types of Decant

In all cases of decant, whether on a temporary or permanent basis we will:

- if required provide and where appropriate pay for emergency accommodation;
- provide the customer with the expected timescales for work to be completed and where appropriate expected return date;
- consult and involve the customer in any decision in relation to decant arrangements and any offer of alternative accommodation;
- work closely with the customer concerned to ensure we assess their individual needs and requirements to provide the necessary support throughout;
- pay the cost for storage of any of the customer's furniture or goods as required during the process;

- ensure any temporary decant period is kept to a minimum;
- work with the customer to ensure any benefits continue to be received;
- cover the costs of any standing charges for utilities in the customer's main property;
- offer rehousing advice and support to occupants or leasehold properties who are not the leaseholder;
- offer priority rehousing status to any customer whose home is due to be demolished.

Emergency Decants

An emergency decant occurs when a property becomes uninhabitable due to an immediate health and safety risk for e.g. fire or flood. If the tenant and their household are not able to stay with family or friends we will offer temporary accommodation. Given the urgent nature of these situations the temporary accommodation may be in hotels or B&B, if there is no suitable temporary accommodation within our own stock.

If a tenant moves into accommodation not owned by the Council such as a hotel, bed and breakfast, etc they will need to continue to pay rent (including claiming Housing Benefit/UC) for their home and we will cover the cost of the temporary accommodation. The tenant will be expected to return to the property as soon as it is safe to do so.

Temporary Decant

A temporary decant occurs when major repairs mean that it is not possible for the household to remain in the property whilst the work is carried out. The repair work would be extensive in nature and render the property uninhabitable, it would not normally include programmes of work such as kitchen, bathroom and heating upgrades.

In deciding whether a decant is necessary we will consider the household composition, needs and preferences; the likely time periods involved; the suitability of alternative accommodation; the level of disruption and the relative cost of carrying out works with the household in situ to the cost of decanting

If the tenant and their family are not able to stay temporarily with family or friends, they will be offered temporary accommodation and return to the property as soon as the work is completed.

We will try to provide the tenant with choice in regard to the temporary accommodation offered to them but cannot guarantee choice will be provided. The tenant will usually only be made one offer of temporary suitable alternative accommodation. Where a tenant refuses a reasonable offer of accommodation we may use appropriate legal remedies to ensure that it is able to complete the work needed.

If the tenant moves temporarily to an alternative Council property and will be returning to their original home, they will be issued with a 'Decant Agreement' in respect of the temporary property. They will continue to pay rent (including claiming Housing Benefit/Universal Credit) on their original home and will not be charged rent in respect of the temporary alternative accommodation.

We will cover any reasonable costs associated with the temporary move. (see Appendix A)

Permanent Decant

A permanent decant may be considered in the following situations

- The property is to be demolished
- The property does not meet the households long term needs and they wish to move permanently.
- Where remedial works may take over 6 months, meaning that temporary accommodation would not be a reasonable option

In situations where a permanent decant has been agreed the tenant will be registered on Homefinder and in accordance with the Councils Allocations Policy will be placed in Band A. Tenants will be able to place bids on suitable properties.

In most circumstances, tenants will be considered for a 'like-for-like' property, taking into account the circumstances and needs of the tenant and their household. Where the tenant is currently under occupying, in line with the Allocations Policy they would normally be offered a smaller property, that meets their current needs. In situations where there are exceptional circumstances; the Tenancy Services Manager will have discretion to offer of a larger property.

Rights and Responsibilities

During the decant process, residents have the right:

- to be kept informed by the Council off the details and progress of their decant
- to be remunerated by the Council for the decant

As part of this, residents have the responsibility:

- to inform the Council's staff of any conditions and needs that would require consideration when planning their decant
- if they require support, to inform the Council of what would be required and the Council where it can will assist

In managing the decant process, the Council reserves the right to:

- consider fully the implications of the planning for the decant
- project specific changes to the property during a temporary decant where the project requires - this must be communicated to the resident.

Offers of accommodation

We will work with tenants to establish their housing needs and will make reasonable efforts to accommodate any preferences for location within our available housing stock, taking into account any support needs.

Large scale redevelopment schemes

In situations where permanent decanting has been agreed for a number of tenants as part of a large scale redevelopment/demolition programme, bids on any vacancies will be considered taking into account :

- Where the applicants property is in the demolition schedule
- Who makes best use of the size and type of accommodation (in line with the Councils Allocations Policy)
- Where all other factors are equal and there are 2 competing bids from residents in the same phase of the demolition schedule the tenant who has had the tenancy longest will be given considered first.

Where there is an emergency or urgent need to decant a tenant, or a tenant is not actively bidding; direct offers of accommodation will be made without the need for applicants to bid. Any direct offers of accommodation will be approved by the Tenancy Services Manager.

In situations where the tenant has refused reasonable offers of temporary/permanent decant properties we may take legal action to gain possession of the property. This will also apply in situations where a tenant refuses to return to their original home when work is completed.

Home loss payments

Where tenants are obliged to move permanently, as a result of demolition, or major planned redevelopment works, and they cannot return to their former home, they are entitled to a statutory home loss payment. Payment will be made if the tenant meets the statutory criteria under s.29 (2) Land Compensation Act 1973. The tenant will need to have been residing in the home for a minimum of one year.

To ensure best use of our financial resources, any housing related debts for e.g. rent arrears, owed to the Council will be deducted and offset from the home loss payment.

Home loss payments are made per household. Where there are joint tenants, one home loss payment will be shared between them.

In situations where a tenant makes a voluntary decision to move permanently and not return to their home once work is complete they will not be entitled to a home loss payment.

Disturbance payments

Disturbance payments are intended to compensate a tenant financially for the actual expenses associated with the need to move. The amount of disturbance payment will vary according to the individual case and are assessed as "reasonable expenses" associated with

the move. Details of what would be covered in Disturbance payments can be found at Appendix A.

We will be flexible, with regard to disturbance payments and will look to meet reasonable individual requests.

Rent charges

Where a tenant moves into temporary accommodation, the tenant will continue to be liable to pay the rent charges on their principal home whilst they are temporarily living elsewhere.

If a tenant chooses to stay with friends or family, or make their own alternative arrangements for temporary accommodation, they will not be charged any rent or service charge associated with the home they have moved from whilst they are not living there.

The tenant will be liable for Council Tax on their temporary property, whilst we will cover the cost of charges at their permanent home.

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Appendix A

Examples of Disturbance Payments

The following table outlines where Housing Services will cover payments relating to a permanent or temporary decant using its own housing stock. This list is not exhaustive and other reasonable requests will be considered:

Example	Permanent Decant	Temporary Decant
Removals Company	Cover the cost and/or make arrangements for removals	Cover the cost and/or make arrangements for removals
Travel Costs	Not Applicable	We will consider requests to cover additional travel costs related to work or education whilst in temporary accommodation.
Storage	Not Applicable	Cover the cost and/or make arrangements for items to be stored for the duration of the decant.
Disconnection / Reconnection of Cooker	Yes	Yes
Provision of White Goods	Not applicable	We will ensure that a suitable cooker, fridge and washing facilities.
Redirect of mail	if the tenant arranges re-direction of mail, we will reimburse the cost for all household members for up to 6 months.	if the tenant arranges re-direction of mail, we will reimburse the cost for all household members for up to 6 months.
Carpets and floor coverings	Where possible, households are expected to re-use the floor covering in their homes. We will arrange for the uplift and refitting of carpets, underlay and/or laminate flooring.	Temporary accommodation will be provided with basic floor coverings

In some situations including emergency decants it may be necessary to source hotel accommodation in these situations tenants may be given a meal allowance and consideration will be given to additional expenses for launderette costs, Kennel fees for pets etc .

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Equality Impact Assessment Form



Directorate: Transformation, Housing and Resources	Service: Housing Services
Completed by: Nicola Bradley	Date: August 2022
Subject Title: Decant Policy	
1. DESCRIPTION	
Is a policy or strategy being produced or revised:	Yes
Is a service being designed, redesigned or cutback:	No
Is a commissioning plan or contract specification being developed:	No
Is a budget being set or funding allocated:	No
Is a programme or project being planned:	No
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty (Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations):	Yes
Details of the matter under consideration:	Introduction of Decant Policy covering permanent and temporary moves from Council homes to allow, repair, improvement r redevelopment work to proceed
<p><i>If you answered Yes to any of the above go straight to Section 3</i> <i>If you answered No to all the above please complete Section 2</i></p>	
2. RELEVANCE	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No*
If Yes , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered Yes go to Section 3</i>	
If you answered No to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	
3. EVIDENCE COLLECTION	

Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	Council Tenants
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?	The Policy will be applied to any Council tenant who is required to decant. No particular group will be impacted more than any other.
Which of the protected characteristics are most relevant to the work being carried out? Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity	Yes No Yes No No No No No No No
4. DATA ANALYSIS	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	The Council currently has 1 family being decanted due to structural work being required.
What will the impact of the work being carried out be on usage/the stakeholders?	There will be no impact in terms of the number of decants. The Policy will improve transparency and create a more consistent approach to all tenants regardless of protected characteristics.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	Given the very low number of decants no satisfaction data is captured. No recent formal complaints have been received in connection to decant arrangements.
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	Data relating to current tenants has been considered. The Council has 5735 tenants. 61.5% of primary tenants are Female 38.5% are male. Of those tenancies where we have an

	<p>Ethnic origin recorded 94.3% are White British</p> <p>29.6% are over 66 years of age</p> <p>35.19% of those where who have provided information consider themselves to have a disability.</p> <p>2011 Census data The gender of the borough is relatively balanced overall with 52% of the population identifying as female. West Lancashire has a diverse population in terms of age and in 2020, 19.4% of the population were under 18; 58.3% were aged 18-64 and 22.3% were aged over 65 years. The census reflected very small numbers of residents with other ethnicities: Asian / Asian British at 0.8%; Black / Black Asian at 0.2%; Mixed Race at 0.2% and Other at 0.1%. In the 2011 Census, 76% of residents declared themselves to be Christian, with 17% stating that they do not follow a religion. The 2011 Census showed that more than 20% of West Lancashire residents consider that their day-to-day activities are limited to some extent by a long-term health problem or a disability</p>
<p>If any further data/consultation is needed and is to be gathered, please specify:</p>	
<p>5. IMPACT OF DECISIONS</p>	
<p>In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?</p>	<p>Any customer required to move from their home will be inconvenienced, certain groups may however be more effected than others. Older customers, those with disabilities, and those with children may be more effected by having to move.</p>
<p>6. CONSIDERING THE IMPACT</p>	
<p>If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or</p>	<p>Each decant situation will be considered on a case by case basis to ensure the individual needs of the customer are taken into account.</p>

financial drivers etc.).	<p>For older tenants we would take into account support needs for example tenants living in sheltered accommodation would where possible be offered an alternative sheltered property. Guest bedroom facilities are also available for short stays. Adaptation needs of disabled customers would be taken into account when establishing the suitability of decant accommodation.</p> <p>An elderly or disabled customer may suffer more disruption from major works than other tenants, the decision whether to decant will take the needs of the customer into account.</p> <p>Tenants with children may experience difficulty getting children to and from school if the decant property is further away, reimbursement of additional travel costs can be considered.</p>
What actions do you plan to take to address any other issues above?	<p>No actions</p> <p><i>If no actions are planned state no actions</i></p>
7. MONITORING AND REVIEWING	
When will this assessment be reviewed and who will review it?	The EIA will be reviewed along with the Decant Policy every 3 years

LSC: 18th January 2023

CABINET: 24th January 2023

EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
12th January 2023



Report of: Corporate Director of Transformation, Housing & Resources

Relevant Portfolio Holder: Councillor Pryce-Roberts

Contact for further information: Nicola Bradley (Ext. 5296)
(E-mail: nicola.bradley@westlancls.gov.uk)

SUBJECT: DRAFT HOUSING ALLOCATIONS POLICY

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To consider and agree the Housing Allocations Policy subject to statutory consultation.

2.0 RECOMMENDATIONS TO CABINET

2.1 That the Draft Allocations Policy attached at Appendix 1 of the report be approved for consultation.

2.2 That the Head of Housing, in consultation with the relevant Portfolio Holder, be given delegated authority to make minor updates and changes as required to this policy following public consultation, and to implement and deliver the policy.

3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW & SCRUTINY COMMITTEE

3.1 That the contents of the policy be considered by the committee.

4.0 BACKGROUND

4.1 The Housing Allocations Policy was last updated in 2018. Since then, the Policy has provided a fair and transparent way of allocating housing. Whilst there are no

significant changes proposed in terms of assessing housing need the revised Draft Policy aims to make the best use of council housing stock, and address issues associated with the increased level of homelessness.

- 4.2 The Draft Allocations Policy, attached at Appendix 1, sets out the criteria for acceptance onto the Councils Housing Register and also the priority band in which applicants should be placed.
- 4.3 The Draft Policy will be subject to external consultation for a period of 12 weeks. A copy of the Draft Policy will be available on the Councils website and views will be sought from both Homefinder applicants and members of the public. Copies of the Draft Policy will also be sent to our RSL partners and other agencies such as Lancashire County Council Social Care, Liberty Centre, Birchwood Centre.
- 4.4 Prior to formulating the draft policy a consultation took place with applicants on the Housing Register and those who had been rehoused by the Council in the past two years.

5.0 HIGHLIGHTS FROM CONSULTATION

- 5.1 64.4% thought that single people should be able to bid on 2 bedroom properties
- 5.2 Participants believed that the current ineligibility criteria around those owing debts to the Council, damaging Council property, previously purchasing through Right to Buy, owner occupiers, or being guilty of Anti Social Behaviour are fair.
- 5.3 Respondents were asked to rank the factors they felt are most important when allocating a home:

OPTIONS AVG.	RANK
Assisting those suffering with domestic abuse	3.47
Housing homeless families in the area	3.86
Moving for medical purposes (adapted or level access housing)	5.09
Housing homeless single people or couples.	5.82
Those needing to move closer to family or friends for support due to a medical condition	6.94
Assisting ex armed forces personnel with suitable homes	6.98
Those living in overcrowded situations	7.39
Victims of Anti Social Behaviour	7.41
Those living in poor quality private rented housing	7.78
Those renting privately who have been served a notice to quit	8.44
Those in financial difficulties	8.91
Families with young children living in upper floor flats/maisonettes	9.46
Moving into first tenancies (from family home or currently staying with	9.51
Those living in a suitable home but who would like to move to a different area	12.03

- 5.4 58.9% of respondents did not feel that it was fair to give increased priority to those applicants who were working.
- 5.5 64.4% of applicants felt that it was fair that families with young children should be considered for houses before adult households.
- 5.6 63% felt that once housed there should be a time limit before tenants can reapply for an alternative property.

6.0 SUMMARY OF MAIN CHANGES

6.1 Homelessness

Whilst the Homeless Reduction Act came into force in April 2018 the impact of the additional duties placed on local authorities has not been fully felt until now. In addition, the Domestic Abuse Act widened the definition of the homelessness 'priority need' category creating additional pressures on our Homelessness services. The number of homelessness presentations has increased by 48% in the first 2 quarters of 2022 compared with same period in 2018.

The use of Temporary accommodation has also increased significantly as has the average time in people need to stay in temporary accommodation before they are find a home.

Number of Temporary Accommodation Placements & Average Stay by Year

Year	Number of Placements in Temporary Accommodation	Average stay in Temporary Accommodation – in Days
2018	22	54
2019	23	73
2020	77	60
2021	50	79
2022	40	97 (as at Nov 22)
Grand Total	212	

It is therefore critical that the Allocations Policy be updated to respond to these emerging challenges. The customer feedback exercised echoed that housing homeless families should be an important factor to be considered when letting homes, second only to those fleeing domestic abuse.

The revised Draft Policy includes the following key changes for consideration:

Applicants in one of the following groups will be placed into Band B High Priority:

- Statutory homeless applicants accepted as being owed the main housing duty
- Applicants who are homeless and owed the Relief duty

- Applicants who are threatened with homelessness within 56 days and are owed the Prevention duty and in priority need will be placed into Band B

To ensure that Homeless persons are given more priority than other High Need applicants, for example those in Band B for overcrowding, it is suggested that Homeless applicants meeting the above criteria will be awarded a Plus Status. During the short-listing process applicants with the enhanced 'Plus' status will appear above those applicants with the same level of housing need; i.e. in the same band who are not owed any Homelessness duty.

In addition, whilst applicants assessed as being owed the Homelessness Prevention Duty will be expected to actively make bids against suitable properties, it is proposed that applicants assessed as being owed a homelessness Relief Duty or those where a statutory decision has been issued finding them to be unintentionally homeless and in priority need and owed the 'main housing duty' will be made an offer of accommodation through Direct Matching. It is anticipated that this will reduce the numbers needing to be placed into temporary accommodation or where this is unavoidable will keep the length of stay to a minimum.

6.2 Urgent need

Band A priority is awarded where an applicant demonstrates an urgent need to move, at present an applicant can retain this priority status indefinitely. To encourage applicants in Band A to actively bid for accommodation which addresses their housing need rather than to wait for their ideal property the Draft Allocations Policy introduces a 6 month time limit. The Housing Options team will monitor bidding activity and where no suitable properties have been advertised in the time period, an applicant will retain Band A priority for a further 6 months.

6.3 Income and Asset Limits

Whilst feedback from consultation was that existing Income and Asset rules were fair, given cost of living pressures the threshold levels have been reviewed. Applicants who earn over the Income threshold or have savings or equity over the Assets limits would not normally be considered eligible to join the Housing Register.

It is proposed to increase the income threshold from £40,000 to one third of the average house price in West Lancashire, at current levels this would be £50,000. This level will be reviewed annually using ONS house price data.

It is proposed that the saving/asset threshold be increased from £60,000 to £80,000.

6.4 Transfers

To create more sustainable tenancies applicants will not normally qualify to re-join the housing register for 24 months from the start of their tenancy. In

situations where applicants have experienced a change in their circumstances or have an urgent need to move their circumstances will be considered on a case by case basis.

6.5 Economic and Community Contribution

The current policy awards a Plus status to applicants meeting Economic or Community Contribution criteria. Applicants may be eligible for the Economic/Community Contribution Award if they are working, in training, or volunteering subject to conditions.

2% of applicants on the current Housing Register have Plus status on grounds of Community Contribution and 12% on the basis that they were working. Whilst only 14% of the Housing Register meet the criteria, 25% of all lettings are made to those with a Plus status, this rises to 40% for allocation of family houses.

Applicants who are working and have the Plus status awarded to their application are rehoused into general needs accommodation in an average of 266 days. The average for the those without the plus status is 463 days.

This criterion places those applicants who are unable to work or volunteer due to a disability, caring responsibility or other characteristic at a disadvantage. In 32% of applications the main applicant has identified as having a disability.

In addition, as only 19% of Homeless applications in 2021/22 stated that they were not on benefits the criterion does not support those in most urgent need of accommodation.

To ensure fairness and avoid disadvantaging those applicants who are unable to work and who have no other housing options available to it is proposed to remove this criterion.

6.6 For the purposes of assessing overcrowding, households with an expectant mother will now be treated as though the child has been born at 30 weeks of pregnancy. This aims to support expectant parents in securing suitable accommodation prior to the birth of their child.

6.7 As the Council has limited availability of 1 bedroom flats, applicants on the list for 1 bedrooms are having to wait longer to be housed. To address this the revised Draft Policy will allow single people and couples assessed as eligible for 1 bedroom to bid on both 1 and 2 bed flats, maisonettes or bungalows, however this would be subject to an affordability assessment

7.0 IMPLEMENTATION

7.1 Implementing the Draft Policy once approved will require a number of actions. Firstly, the existing list of housing register applicants will need to be re-assessed

in line with the new Policy as some applicants will be impacted by the changes. Additionally, the Choice Based Lettings system will need to be updated.

- 7.2 Subject to approval the new Policy will take effect following wider consultation and consideration of any comments received. All affected applicants will have to be informed individually of any changes to their application and would need sufficient time to exercise a right to appeal against the decision.

8.0 SUSTAINABILITY IMPLICATIONS

- 8.1 This Policy formalises our approach to supporting tenants and residents who need housing, ensuring we provide good quality homes to those in most housing need.

9.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 9.1 There are some financial resource implications arising from this report in respect of updating the Choice Based Lettings software, a growth bid has been submitted.

10.0 RISK ASSESSMENT

- 10.1 The actions referred to in this report are covered by the scheme of delegation to officers and any necessary changes have been made in the relevant risk registers.

11.0 HEALTH AND WELLBEING IMPLICATIONS

- 11.1 The Policy aims to promote the wellbeing of our tenants and residents by providing help and support to those who are homeless or need more suitable accommodation.

Background Documents

*There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

* There is a direct impact on members of the public, employees, elected members and / or stakeholders, therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained within this report

Appendices

1. Draft Allocations Policy
2. Equality Impact Assessment

WEST LANCASHIRE BOROUGH COUNCIL

HOUSING ALLOCATIONS POLICY



November 2022

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1.0 Introduction

- 1.1 This document sets out West Lancashire Borough Council's Housing Allocations Policy and contains the priorities and procedures for allocating Council homes and nominations to Private Registered Providers of Social Housing in the borough.
- 1.2 The Allocations Policy takes into account all legal requirements outlined in the Housing Act 1996, Part VI and amendments made under the Homelessness Act 2002, the Localism Act 2011 and the Homelessness Reduction Act 2017.
- 1.3 The Head of Housing Services has the delegated authority to make amendments to this policy where there have been legislative changes.
- 1.4 This current version came into effect on the XXXXXX.

2.0 Aims & Objectives

- 2.1 The Policy aims to:
 - Discharge the Council's statutory duties as contained in Part VI and VII of the Housing Act 1996, as amended by the Homelessness Act 2002, the Localism Act 2011 and the Homelessness Reduction Act 2017.
 - Offer customers information to enable them to make informed choices about their housing options.
 - To provide an easy to understand, fair and transparent system.
 - Make the most effective use of the local housing stock.
 - Ensure and promote equality of opportunity.
 - Promote sustainable tenancies and communities.

3.0 Principles of the Allocation Scheme

- 3.1 The Council is committed to the provision of a customer focussed and equitable allocations scheme in accordance with the following general principles:
 - All those seeking an allocation of social housing from the authority (or its partner Private Registered Providers), must apply to join the housing register.
 - All applicants aged 18 or over who are eligible will be allowed to join the scheme unless they are disqualified.
 - Applicants for social housing are assessed in terms of their housing needs and are banded accordingly.
 - Allocations will be made on the basis of the applicant's priority band and within each band on the basis of the date the level of priority was awarded.

- In the designated local connection areas applicants who have a local connection with a particular housing area will be given preference for an allocation in that area over applicants with the same level of housing need i.e. in the same band, who do not have a local connection.
- Applicants will be given choice and may express their preferences with regards to areas of choice.
- Nominations for allocations by partner Private Registered Providers will be made on the same basis as for the letting of Council accommodation.
- Accommodation is allocated in accordance with the guidelines on household types, property size and type of property.

4.0 Scope of Policy

4.1 This Policy applies to all applications for:

- An allocation of Council accommodation.
- A transfer of accommodation from existing Council tenants or tenants of other social landlords.
- Nominations to Private Registered Providers.

5.0 Allocations excluded from the scheme

5.1 The following in particular are excluded from the allocations scheme:

- Mutual Exchanges.
- Succession or assignment of tenancy.
- Tenancies granted or disposed of by a court order made under the Matrimonial Causes Act 1973; Matrimonial and Family Proceedings Act 1984, the Children Act 1989 or the Civil Partnership Act 2004.
- Where an introductory tenancy becomes a secure tenancy.
- Other special cases where it may be necessary for the authority to make an allocation outside the terms of the scheme.
- Temporary lettings to homeless households

6.0 Equality of Opportunity in Housing

6.1 We aim to make every effort to ensure that all sectors of the community have equal access to services offered by the Council. No person will be treated less favourably on the grounds of Age, Disability, Gender Reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race, Religion and Belief, Sex and Sexual Orientation.

7.0 Policy on Choice

- 7.1 The Council is committed to offering applicants a choice of accommodation and allowing them to express their preferences, through West Lancs HomeFinder, its choice based letting scheme. However, the Council may not be able to meet all requests due to the level of demand or availability of accommodation. Applicants will therefore be given advice and information to help them understand their options and make informed choices.
- 7.2 Vacant properties will be advertised and applicants are required to actively seek and 'bid' for properties in which they are interested. Applicants would only be considered for a property if it was a suitable size and type for their household. Applicants expressing an interest in a particular property will be shortlisted and the applicant with the highest priority (in the highest band for longest) will be made the offer and invited to view the property.

8.0 The HomeFinder Scheme

8.1 Advertising.

Properties which are empty or due to become empty will be openly advertised daily on a 6 day cycle, at www.westlancshomefinder.co.uk. The scheme extends to include accredited private landlords, and Private Registered Provider vacancies.

8.2 Labelling.

Adverts will detail who is eligible to bid for a property i.e.:

- Size and type of household that the property is suitable for.
- Any restrictions on age e.g. over 40s only.
- Whether it is Independent Living accommodation.
- If pets allowed.
- If preference is given to applicants with a local connection to the village.

8.3 Expressions of Interest.

Applicants will be able to express their interest:

- Via the West Lancs HomeFinder website.
- By automated telephone line.

All applicants on the housing register can bid on a maximum of 3 properties at any one time. Applicants who have already accepted an offer of a property will be ineligible to bid.

8.4 Direct Lets.

Whilst the Council aims to allocate all its empty properties via the CBL scheme, it reserves the right to direct match applicants to properties in exceptional circumstances, these would include:

- Applicants assessed as being owed a homelessness relief duty or 'main housing duty'
- Public protection cases.
- Successor tenants or those left in possession of a West Lancashire Council property.
- Temporary or permanent decants.
- Properties that have been significantly adapted.
- Temporary accommodation.
- Extra Care accommodation.
- Where a local lettings policy applies e.g. new build accommodation (see 23.2).

Direct Matches will be approved by the Tenancy Services Manager or suitably experienced Senior Officer who has been delegated this task.

8.5 Available Now Properties.

The Council will be more flexible in its approach to allocating properties where the normal advertising system has failed to identify a suitable tenant. These 'Available Now' properties are let on a first come first served basis, irrespective of an applicant's band or bedroom requirements. However, in cases where we receive more than one expression of interest, consideration will then be given to applicants banding and best use of housing stock.

Expressions of interest may also be considered from those applicants who may not normally be considered eligible, e.g., elderly owner occupiers who are interested in moving to an Available Now Independent Living Property.

Applicants still need to be registered and approved on the housing register as normal.

An 'Available Now' property is any property that has been advertised via HomeFinder and either received no bids or where refusals have resulted in an empty shortlist. Before designating as 'available now' the property will have been made available for bidding to all applicants who would be eligible for the property type e.g., a 3 bed house would have been made open to all applicants eligible for 2 or 3 bed houses.

8.6 Feedback.

Information on all the properties let through the CBL system will be provided on the West Lancs HomeFinder website. This will include the following information:

- Lettings results – property type and neighbourhood
- The total number of bids made for the property
- The successful customer's band and effective date

8.7 Offers.

Applicants will be notified of an offer by email. As many of the Council's vacancies will be advertised prior to the outgoing tenant leaving, they may not be ready to view for a few weeks. In cases where the property is not empty, an offer will be made on a provisional basis only and may need to be withdrawn.

Where the first applicant refuses an offer of accommodation, the Lettings Officer will go to the next highest banded applicant and so on.

8.8 Viewing.

Applicants are given the opportunity to view any property offered to them. Following the viewing, the applicant is expected to decide whether they wish to accept the tenancy.

In situations where a property is advertised and no bids are received, it will be re-advertised in the next cycle with the bidding opened up to applicants who satisfy the lettings criteria for smaller properties, usually one bedroom less.

8.9 Rent in advance.

We will always request rent in advance even if the tenant intends to or is currently claiming housing benefit or housing cost support through Universal Credit.

*The agreed advance payment is the payment pattern that the tenant agrees to e.g.:

- Weekly = 1 weeks full rent
- Fortnightly = 2 weeks full rent
- 4 Weekly = 4 weeks full rent
- Monthly

Applicants will be expected to put money aside to ensure they can meet the rent in advance payment. Offers will be withdrawn if an

applicant is unable to make an advance payment on day of the tenancy sign up. All new tenants will need a bank account as the rent in advance payment can only be taken from a debit or credit card.

9.0 Offering Choice to Homeless Applicants

- 9.1 Applicants assessed as being owed a homelessness prevention duty are expected to actively make bids against suitable properties.

Bidding patterns will be monitored on a weekly basis. In situations where bids are not being made or all bids are against unobtainable properties, the Homelessness Officer will place bids on the applicant's behalf. The Council's duty will be discharged through the first successful bid.

- 9.2 Applicants assessed as being owed a homelessness relief duty or those where a statutory decision has been issued finding them to be unintentionally homeless and in priority need and owed the 'main housing duty' will be made an offer of accommodation through Direct Matching. This offer will discharge the Council's duty.
- 9.3 Consideration will be given to any representations made by the applicant as regards the suitability of certain locations. Areas will not be regarded as suitable if evidence confirms that the area is unsuitable due to the applicant being at risk of violence, threats of violence or harassment if they resided in that area.

10.0 Application Process

- 10.1 Any eligible person aged 18 or over who is not disqualified can join the housing register.

Applications should be made by completing an online application at www.westlancshomefinder.co.uk

Some applicants will require advice and assistance to complete the application form. In such cases Housing Options Advisors will provide advice and assistance and will, if necessary, complete the form on behalf of an applicant.

Applicants will need to supply proof of identification e.g. a picture driving licence or passport and a reference which must be from their current or previous landlord (where this is not possible from an employer or other professional). Supporting documentation can be sent to myhousingapplication@westlancs.gov.uk ensuring the email contains the applicants name, address and Homefinder reference number. Alternatively, documents can be handed in at the Council's Customer Service Points in Skelmersdale or Ormskirk.

Existing Council tenants are not required to supply a reference.

The fact that a person is an applicant for an allocation of housing accommodation shall not be divulged (without their consent) to any other member of the public.

10.2 The registration process will involve:

- Checking if the applicant is eligible, that the information given is correct and, if necessary, recommending that an application should not be considered for an allocation.
- Assessing if the household is in housing need and placing the application in a priority band.
- Verifying information from references with current or former landlords and others. Information will be requested about current or former tenant arrears, payment history, current or previous anti-social activity and any rechargeable repair debts. Credit checks will also be carried out. Police checks may be carried out where there are grounds to do so e.g. the applicant has spent time in prison or is unable to account for any previous addresses.
- Interviewing the applicant where necessary.
- Affordability Assessment.

All applicants will be expected to provide up to date information and appropriate supporting evidence regarding their finances at the point of application, including their income and expenditure and details of any current savings or debts. Failure to provide this will lead to the application being rejected. An affordability assessment will be carried out with all applicants for housing. Where the affordability assessment indicates that the property is not affordable, taking benefit entitlements into account, the application will be rejected. Advice will be given to all applicants regarding the prevailing government policies regarding housing and future benefit entitlement and how it could impact upon them as a household.

10.3 False Statements.

Section 171 of the Housing Act 1996 makes it a criminal offence for anyone seeking assistance from a housing authority under Part 6 of the Act to:

- a) Knowingly or recklessly give false information; or
- b) Knowingly withhold information, which the housing authority has reasonably required the applicant to give.

A person guilty of an offence under this section is liable on summary conviction in a magistrates court to a fine not exceeding level 5 on the standard scale

The circumstances in which an offence is committed could include:

- a) Any false information given on an application form for social housing.
- b) Any false information given during an interview.
- c) Any false information given in response to subsequent review letters or other updating mechanisms; or
- d) Any false information given or submitted by applicants during the proceedings of a review.

Ground 5 in Schedule 2 to the 1985 Housing Act (as amended by the 1996 Act s.146) enables a housing authority to seek possession of a tenancy which they have granted as a result of a false statement by the tenant or a person acting at the tenant's instigation.

11.0 Applicants Under 18

11.1 If an applicant is under 18 years of age, their application will normally not be accepted onto the housing register. We will make exceptions in the following circumstances:

- Any person leaving Local Authority care or Young people, who have previously been in care and are covered by the Leaving Care Act 2002.
- Any person accepted as statutorily homeless (if they cease to be homeless they will become ineligible for the housing register until they reach the age of 18).

A person under the age of 18 is not able to hold a legal estate in land so they will therefore require a Trustee to hold the tenancy in trust for them until the young person reaches the age of 18 when they will be given an Introductory Tenancy in line with Council policy. Any contract entered into will allow the Council to recover any unpaid rent through the courts in the normal way. This can also mean that the Council may seek an order for possession from the courts.

In cases where the decision is not to offer a tenancy, a referral for support accommodation may be considered.

11.2 Pre Tenancy Support under 25's

In situations where the Council considers that a young person may be eligible to join the housing register, it may delay accepting the application until the applicant has undertaken a course of pre tenancy support or training.

12.0 Eligibility

12.1 Not all applicants applying to join the housing allocation scheme are eligible to join. Section 160Z(A) of the Housing Act 1996 (as amended by The Localism Act 2011) sets out who is not eligible to be allocated housing:

- a) Persons subject to immigration control - such a person is not eligible for an allocation of accommodation unless he or she comes within a class prescribed in regulations made by the Secretary of State (s.160ZA(2)); and
- b) Other persons from abroad other than a person subject to immigration control regulations may provide for other descriptions of persons from abroad who, although not subject to immigration control, are to be treated as ineligible for an allocation of accommodation (s.160ZA(4)).

Where an applicant is already an existing secure, introductory or assured tenant of accommodation allocated to him or her by a local housing authority or Registered Social Landlord, he or she cannot be disqualified on the basis of his or her immigration status.

12.2 Persons Subject to Immigration Control & Persons from Abroad.

Where an applicant is a person from abroad, their application will be assessed to determine whether they are eligible under the relevant legislation and guidance.

Each applicant will be provided with written reasons if they are assessed as being ineligible for an allocation of accommodation and will have the right to seek a review of that decision (see Appendix 4).

If any question arises which brings into question the eligibility of an applicant to join the housing register and obtain an allocation of housing accommodation, the authority reserves the right to seek further information and clarification, including from the UK Border Agency.

Applicant's eligibility will be reassessed prior to any offer of accommodation as well as at the initial point of application.

12.3 Qualification.

Housing Authorities may only allocate accommodation to people who are defined as 'qualifying persons'. Subject to the requirement not to allocate from persons from abroad who are ineligible and to any regulations, a housing authority may decide the classes of people who are, or are not, qualifying persons.

12.4 Applicants will not be considered qualifying persons if:

- A. Unacceptable behaviour.

If an applicant or a member of his/her household is found to have been guilty of unacceptable behaviour serious enough to make them unsuitable to be a tenant and, in the circumstances at the time the application is considered, they are still deemed unsuitable to be a tenant of the Authority by reason of that behaviour, they will not be a qualifying person.

Unacceptable behaviour is defined as behaviour which would, if the person was either a secure tenant or a member of a secure tenant's household, entitle a landlord to a possession order under grounds 1 to 7 of the Housing Act 1985 Schedule 2. The grounds are:

- Ground 1 Rent arrears or breach of tenancy.
- Ground 2 Behaviour which is a nuisance or annoyance to those in the locality of the dwelling or conviction for using the dwelling for immoral/illegal purposes or committing an indictable offence in or in the locality of the dwelling house.
- Ground 2A Domestic violence causing a partner or other family member to leave the property.
- Ground 3 Deterioration of the dwelling house due to waste, neglect or default.
- Ground 4 Deterioration of furniture provided by the landlord due to ill-treatment.
- Ground 5 Tenancy induced by false statement.
- Ground 6 Premium received or paid in connection with a mutual exchange.
- Ground 7 Eviction from a dwelling within the curtilage of a building held for non-housing purposes due to conduct such that given the nature of the building it would not be right for occupation to continue.

The position in relation to rent arrears and anti-social behaviour specifically is considered below.

The Council will:

- Investigate the individual circumstances of an applicant's case to establish if there is evidence of unacceptable behaviour that would fall under grounds 1 to 7 above.
- Establish whether the unacceptable behaviour is considered to be serious and whether it is likely that a possession order would have been granted as a result of that behaviour.
- Decide if the applicant is unsuitable to be a tenant by reason of their behaviour at the time the application is considered, taking into account whether there have been any changes in the circumstances or behaviour of the applicant.

Where the Council is satisfied that these criteria are met, the applicant will not qualify for an allocation and therefore be excluded from the housing register. This exclusion will be in place for a period of 2 years.

When making the assessment, the Council will act reasonably and will consider all relevant matters regarding health, dependants, social or other factors. Regard will also be given to the wider interests of the public.

Where the Council regards the behaviour as unacceptable but considers that the applicant should not be classed as non-qualifying, the Council may decide to accept the application but place it in Band E (reduced priority) even if the application would normally attract a higher band.

Each applicant will be provided with written reasons if they are assessed as being non-qualifying and will have the right to seek a review of that decision. The applicant will also have the right to ask the Council to review their case at any time during the exclusion period if they feel that there has been such an improvement in their behaviour that they should no longer be considered to be unsuitable.

Where the applicant has been excluded for 2 years and makes a further application, but there has been no improvement in their behaviour and the conditions for finding them unacceptable to be a tenant remain, the applicant can be excluded for a further 2 years (subject to the same review process as above).

12.5 Rent Arrears and other housing related debt.

The accrual of rent arrears will be considered serious where:

- a) An applicant owes rent from a previous tenancy, which resulted in a possession order being granted; or
- b) The applicant has current rent arrears serious enough for a court to grant an outright possession order

Where the conditions of either (a) or (b) above have been met, the Council may decide that the applicant is not a qualifying person.

Where there are insufficient grounds to determine that an applicant is not a qualifying person, the application to join the housing allocation scheme will be suspended until the debt has been cleared. Each case will be considered on its own merits taking into account the level of debt, reasons for the arrears and steps taken to resolve the problem. Suspension would not normally be lifted until the debt has been reduced by 50% and regular payments made for 3 months.

Applicants owing more than £500, will not be accepted onto the housing register. Any applicant found to have this level of arrears outstanding will have his or her application cancelled. The applicant will

be able to re-apply once the arrears have been reduced to under £250 and regular agreed payments have been made for 3-months.

An applicant can make payments of arrears on a weekly or monthly basis and there is no minimum payment. The Council will usually look for the minimum payment to be the level of direct payment if the applicant is on state benefits or a reasonable amount if they are working.

If payments are made for the required time, the application will be approved in the relevant band even if arrears are still outstanding however, the applicant must continue to reduce the debt until it is cleared in full.

The account will be monitored and should payments stop, the application will be cancelled. The arrears must then be cleared in full before another application will be accepted.

Each case will be assessed on its own merit and the Tenancy Services Manager has the discretion to approve applications with rent arrears and award the relevant band where there are exceptional circumstances. This will include, but will not be limited to, those current tenants of the Council who under-occupy a tenancy and have accrued arrears as a direct result of the changes in Housing Benefit Regulations under Welfare Reform.

Applicants who have been assessed as being unintentionally homeless and in priority need, or are in homeless prevention, will be considered for an allocation despite any rent arrears. An agreement to pay will still be required.

12.6 Anti-Social Behaviour.

Anti-social behaviour includes conduct likely to cause nuisance and annoyance, harassment, violence or intimidation to others or the use of property for illegal or immoral purposes.

This behaviour will be considered serious where the evidence is such that it would entitle the authority to obtain a possession order from a court.

Any applicants found to be not qualifying on such grounds will normally be advised that they will not be considered qualifying for an allocation of housing until they have conducted themselves appropriately for a period of 2 years following the last unacceptable incident. However, each individual application will be considered on its merits in terms of the length of time the applicant will be ineligible.

Where there are insufficient grounds to determine that an applicant is ineligible for an allocation, the application to join the housing register

will be accepted but not awarded any priority until the Council considers that the behaviour of the applicant has improved.

The same procedure will be applied to applicants who have been guilty of unacceptable behaviour under any of the other grounds (2A to 7 see above paragraph 12.10).

Criminal convictions - Applicants will be required to complete the declaration on the application form setting out any criminal convictions, or any other type of injunction that relate to the applicant or any person listed on the application. Failure to disclose such information or update the Council in relation to any new convictions may result in the application being cancelled.

The Council may conclude that an applicant with convictions is eligible to join the register but choose to limit the areas or types of accommodation that an applicant may express an interest in.

12.7 B. Damage/Neglect of Council Property

Current Council Tenants who have not maintained their property in accordance with the terms of their tenancy will be considered to be not qualifying and will be required to make good any damage before qualifying for inclusion on the Register.

12.8 C. Housing Debt

Applicants who owe the Council a housing debt for example for damage, clearance or unauthorized alterations to a Council property. Applications will be suspended until the debt has been cleared. Each case will be considered on its own merit taking into account the level and reasons for the debt and steps take to resolve the problem. Suspension would not normally be lifted until the debt has been reduced by 50% and regular payments made for 3 months.

In cases where an applicant has a debt in excess of £500 or is as a result of wilful damage or neglect of a property, they will be treated as not being qualifying persons; therefore an application to join the housing register will not be accepted.

12.9 D. Right to Buy

Those who previously purchased a property through the Right to Buy scheme in West Lancashire, or elsewhere within the last 10 years will not qualify, unless they are applying for Independent Living housing.

12.10 E. Owner Occupiers

In line with government guidance, the Council will not allocate housing to people who already own their own homes. Exceptions would apply

to elderly owner occupiers who need Independent Living accommodation and whose home/assets were not of sufficient value to secure such accommodation privately; those fleeing violence or suffering significant financial hardship or other exceptional circumstances. Where the Council agrees to assist with re-housing, the applicant must not sell their home before they have accepted an offer of accommodation. However, they must agree to sell the property as soon as they have been re-housed and not rent out their home or make any financial gain whilst waiting to sell.

These eligibility rules for owner occupiers will be relaxed where the applicant expresses an interest in an Available Now property.

12.11 G. Income/Assets

Applicants whose income or assets exceed the limits set by the Council.

The income threshold will be based upon an annual assessment of the income required to purchase an averagely priced home in West Lancashire. The annual income level will be set at one-third of the average housing price. For example, the Average house price in March 2022 was £145,000 (based on ONS data) therefore (rounded up) the income level would be £50,000.

The savings/asset threshold will be £80,000. These values will be reviewed regularly.

All households applying to the housing allocation scheme will be assessed for their ability to secure accommodation at market rent or to purchase a suitable property within West Lancashire.

Assets that may be taken into consideration include but are not limited to:

- Savings.
- Property Abroad.
- Commercial property.
- Money received through a divorce settlement.
- Residential Property.
- Bonds.

Lump sum payments to members of the British Armed Forces as compensation for an injury or disability sustained on active service will be disregarded.

12.12 H. Applicants successfully housed into a social housing property through the scheme

Applicants will not normally qualify to re-join the housing register for 24 months from the start of their tenancy.

13.0 Reduced Preference

13.1 Reduced Preference due to unacceptable behaviour.

Where there is insufficient information to determine that a person does not qualify for accommodation on the grounds of unacceptable behaviour it may be decided to reduce their priority band to Band E.

Customers will be given reduced preference in Band E where the Council can be satisfied that having considered all the available evidence they (or a member of their current or prospective household) has failed to adhere to the terms of any current or previous social housing or private sector tenancy agreement.

This would include, but is not limited to, following examples of unacceptable behaviour:

- Failing to maintain the property within the terms of the agreement – for example deliberately or negligently causing damage to a previous or current property, accumulation of large amounts of rubbish in and around the property.
- Committing acts causing or likely to cause nuisance or annoyance to neighbours or others in the locality where they live or where they previously lived. This would include noise nuisance, threatening or abusive behaviour.
- If anyone from the household has been a perpetrator of low level Criminal or Anti-Social behaviour.
- Criminal behaviour that was relevant to the tenancy and/or locality, for example being in possession of illegal drugs, acts of public disorder.
- Breaches of a social or private sector tenancy agreement, for example operating a business from the premises, having an unreasonable numbers of pets at the property.
- Behaving in a threatening, abusive or obstructive manner towards staff of the Council or their contractors.
- Failing to allow access for compliance checks such as gas safety, legionella, fire safety and asbestos checks.

13.2 Reduced Preference due to no Borough Connection.

Applicants who do not have a Borough connection with West Lancashire will still qualify for access to the housing register, however, in general they will not be given any preference and will be placed in Band E. The only exceptions to this in general are:

- Those entitled to additional preference under The Housing Act 1996 (Additional Preference for Armed Forces) (England) Regulations 2012 (SI 2012/2989) or equivalent provisions.
- Those who are accepted as being owed the homelessness prevention or relief duty or have been accepted as being unintentionally homeless and in priority need and there are no grounds to refer the case to another local authority area.
- Those who are able to provide proof of their “need” to move into the area and demonstrate why this “need” cannot be satisfied in their current location.

To qualify for a Borough connection to West Lancashire an applicant must normally:

- Have lived in the area for a period of 3 out of the last 5 years prior to the date of their application; or
- Have close family who have lived in the area for a minimum of 5 years prior to the date of application and the applicant must indicate that they want to move nearer to them. Close family includes parents, children and siblings.
- Have reasonable preference because of a need to move to the local authority's area to avoid hardship, and need to move because the tenant works in the area or needs to move to take up an offer of work.

14.0 Banding Scheme

The Housing Act 1996 as amended by the Localism Act 2011 requires an allocation scheme to be framed so as to secure that reasonable preference is given to various categories of people, which represent general indicators of housing need.

West Lancashire Borough Council has adopted a banding system in line with Government guidance.

Applications for an allocation of social housing will be placed in one of four priority bands:

- A (urgent priority)
- B (high priority)
- C (medium priority)
- D (low priority)
- E (no priority)

Within each band, preference will be given to those applicants who make a Community Contribution.

15.0 Band A – Urgent Priority

15.1 The categories for Band A are as follows:

- Applicants who have been assessed as being owed the homelessness prevention or relief duty or who have been assessed as being unintentionally homeless and in priority need as a result of being vulnerable due to being victims of violence or harassment.
- Applicants applying for an allocation of accommodation who have not been assessed as homeless but need to move urgently due to being victims of violence or harassment.
- Severe overcrowding.
- Urgent Medical Need.
- Unfitness, Disrepair, Demolition.
- Anti-Social Behaviour.
- Left in Occupation.
- Under Occupation.
- British Armed Forces.
- Multiple Needs.
- Foster Carers.

Time Restriction

Priority Band A may be restricted to a time limit of 6 months. This reflects the urgency of the applicants' housing need. Where a time restriction is placed on an application, the Housing Options Team will undertake monitoring of bidding activity. If an applicant fails to bid for suitable properties that have been advertised within the time limit period, then the priority may be removed, or a direct offer made. If no suitable properties have been advertised in the time period, the application will retain Band A priority for a further 6 months.

15.2 Criteria for each category.

15.2a Applicants who have been assessed as being owed the homelessness prevention or relief duty or who have been assessed as being unintentionally homeless and in priority need as a result of being vulnerable due to being:

- Victims of violence.
- Victims of racial harassment amounting to violence or threats of violence.
- Victims of sexual harassment amounting to violence or threats of violence.
- Witnesses or victims of crime who would be at risk of intimidation amounting to violence or threats of violence if they remained.
- Existing tenants who need alternative accommodation due to the above.

This level of priority can only be awarded by the Homelessness Advice & Prevention Team.

15.2b Applicants applying for an allocation of accommodation who have not been assessed as homeless but need to move urgently due to being:

- Victims of violence.
- Victims of racial harassment amounting to violence or threats of violence.
- Victims of sexual harassment amounting to violence or threats of violence.
- Witnesses or victims of crime who would be at risk of intimidation amounting to violence or threats of violence if they remained.

The decision to award this level of priority rests with the Tenancy Services Manager, or a suitably experienced Senior Officer who has been delegated this task. This priority is awarded to facilitate a move away from the current home, geographical bidding restrictions may therefore apply.

15.2c Severe overcrowding.

Households that are statutorily overcrowded, or that have two or more bedrooms fewer than they require and are therefore severely overcrowded. Severe overcrowding priority will not be awarded to those applicants who are in temporary accommodation.

The government's Bedroom Standard will be used to calculate whether a property is overcrowded. Guidance can be found at Appendix 2.

15.2d Urgent Medical Need.

Urgent medical priority will be awarded where:

- The applicant is at significant risk of physical injury by remaining in their current home and is requesting to move to a more suitable type of accommodation, or
- The applicant is at significant risk of a severe breakdown in their mental health by remaining in their current home.

In the case of severe risk to mental health, the applicant's environment will be taken into account, as in these cases the property type itself is not necessarily the causal problem. The applicant must be able to show that the risk will be significantly reduced by a move to their requested location.

15.2e Unfitness and Disrepair

- Where the applicants' home is subject to a Demolition Order, Clearance Area or Compulsory Purchase Order.
- Council Tenants who need to move as their home is part of a Revival Scheme, involving demolition or redevelopment.

- Permanent or temporary decants from Council property in order to carry out improvements or major repairs.
- Properties inspected by the Council's Private Sector Housing Section that are unfit and are subject to a Prohibition Order. This level of priority can only be awarded based on the recommendation of the Council's Private Sector Housing Team. The Housing Health & Safety Rating System will be used as a guide to assessing whether Band A is appropriate.

Where the applicant has not been re-housed and the repair issues have been resolved to the Council's satisfaction, the application will be reviewed to determine whether Band A priority should still be awarded.

15.2f Anti-Social Behaviour.

If a West Lancashire Borough Council tenant is experiencing anti-social behaviour and is requesting a transfer as a result, they may be awarded Band A priority providing the Tenancy Services Manager is satisfied that all options to resolve the situation have been exhausted, and a move is recommended for the applicant's safety by the Police. West Lancashire Borough Council tenants are expected to co-operate with the Anti Social Behaviour team in recording and reporting incidents.

Other Council and Registered Social Landlord tenants will also be expected to have exhausted their own landlord's policy on tackling anti-social behaviour and a comprehensive report will be required from the landlord confirming what action has been taken and why they are unable to offer alternative accommodation from their own stock before this level of priority will be awarded.

Residents within the private rented sector and owner-occupiers must provide evidence of the anti-social behaviour before being assessed for this level of priority.

15.2g Left in Occupation.

Those left in occupation of a West Lancashire Borough Council property, following the death of a tenant, with no succession rights to the tenancy or where the tenant has gone into residential care and the tenancy is to be terminated, will qualify for Band A priority.

The applicant must have lived at the address as their principal home for at least 12-months prior to the tenant's death or confinement to residential care to be awarded this level of priority.

In situations where the applicant left in occupation, is not placing bids, offered of accommodations will be made through the Direct Matching process as agreed by the Tenancy Services Manager.

Those applicants who have not lived at the address for at least 12 months will have their applications assessed to determine which of the other priority bands they qualify for.

15.2h Under Occupation.

Those under occupying a West Lancashire Borough Council tenancy of a family house and who are requesting a move to a smaller property. Tenants living in flats, or maisonettes would not qualify.

Applicants who were originally offered a property larger than their needs may not be awarded this priority unless there is demand for the type of accommodation they are currently occupying.

Each case will be assessed on its own merits.

15.2i Multiple Needs.

Applicants who have met the criteria for any 2 or more of the needs categories identified in Priority Band B. This includes applicants who have been assessed as homeless but also fall into another category within Band B.

15.2j British Armed Forces.

Applicants who are being discharged from the British Armed Forces who have sustained serious injury, medical condition, or disability during service and can prove a Borough connection to West Lancashire through previously residing in West Lancashire or having relatives in West Lancashire.

Members of the British Armed Forces, with a Borough connection, who have been assessed as meeting the Band B criteria for homelessness, unsatisfactory housing conditions, or on medical, welfare or hardship grounds, will be given additional preference and placed in Band A.

15.2k Foster Carers.

Foster Carers approved by the County Council whose housing prevents them from being able to start, or continue, to provide foster care.

16.0 Band B – High Priority

16.1 The categories for Band B are as follows:

- Those applicants assessed as being eligible for assistance, unintentionally homeless and in priority need for reasons other than violence.
- Overcrowding.
- Unsatisfactory Housing Conditions.
- Medical.
- Care.
- Hardship Employment or Financial Grounds.
- Care Leavers Requiring a Move to Independent Living.
- Applicants who no longer require the adaptations in their current home.
- British Armed Forces.

16.2 Criteria for each category.

16.2a Those applicants assessed as being

- Statutory homeless; applicants accepted as being owed the main housing duty
- Applicants who are homeless and owed the Relief duty. The Relief duty applies when a local authority is satisfied that an applicant is homeless and eligible for assistance.
- Applicants who are threatened with homelessness within 56 days and are owed the Prevention duty and in priority need due to being:
 - A pregnant woman or a person with whom she resides or might reasonably be expected to reside.
 - A person with whom dependent children reside or might reasonably be expected to reside.
 - Persons who are vulnerable as a result of old age, mental illness, handicap or physical disability or other special reason or with whom such a person resides or might reasonably be expected to reside.
 - A person who is homeless as a result of an emergency e.g. flood or fire.
 - A person under 21 who was, but is no longer, looked after, accommodated or fostered between the ages of 16 and 18.
 - A person who is aged 21 or more who is vulnerable as a result of having been looked after or accommodated or fostered.
 - Applicants who are being discharged from the British Armed Forces and can prove a Borough connection to West Lancashire through previously residing in West Lancashire, or having relatives in West Lancashire.

The Prevention duty applies when a local authority is satisfied that an applicant is threatened with homelessness and eligible for assistance.

Those Applicants meeting the above criteria will be awarded a Plus Status. During the short-listing process applicants with the enhanced 'Plus' status will appear above those applicants with the same level of housing need;

i.e. in the same band who are not owed any Homelessness duty; see section 25.1.

16.2b Overcrowding.

- Those overcrowded with one bedroom fewer than they require taking into account the Bedroom Standard at Appendix 2.

16.2c Unsatisfactory Housing Conditions.

- Those lacking a suitable kitchen, bathroom or WC
- Those with no supply of cold or hot water
- Households with children under 14 where there is significant or excessive dampness to the property (Housing Health & Safety Rating System)
- Those tenants in the private sector where the Landlord would be, or has been, served with a repair notice by the Private Sector Housing Team (not applicable to Council tenants).

Where the landlord rectifies the repairs to the satisfaction of the Private Sector Housing Team, the application will be re-assessed to determine whether this level of priority should still be awarded to the application.

16.2d Medical Need.

- Those applicants with a serious medical condition that is made worse by the style or functionality of their current home. There must be a causal link between the property type and the deterioration or discomfort arising from the medical problem. Priority is not awarded for medical conditions alone.

Applicants must show that a move to the property type requested will help halt the deterioration in the condition and/or make the applicant more comfortable.

16.2e Care.

- Those who need to move closer to family, friends or relatives to give or receive physical or emotional support or care because of a medical condition.

To qualify for this, the applicant must be moving to West Lancashire from another local authority area or if already resident in the area, be living more than 3 miles away from the family, friends or relatives who will be providing or receiving the care. There must be evidence that this support cannot be provided in the current location.

16.2f Hardship, Employment or Financial Grounds.

Applicants will qualify for this level of priority where:

- There is a need to move to an area or locality to avoid hardship for example to access medical treatment or specialised services that would not be available to them if they did not move to that locality.
- There is a need to move for work related reasons. In determining whether a tenant needs to move to be closer to work or to take up a job offer include:
 - i. the distance and/or time taken to travel between work and home
 - ii. the availability and affordability of transport, taking into account level of earnings
 - iii. the nature of the work and whether similar opportunities are available closer to home
 - iv. other personal factors, such as medical conditions and child care, which would be affected if the tenant could not move
 - v. the length of the work contract
- Whether failure to move would result in the loss of an opportunity to improve their employment circumstances or prospects, for example, by taking up a better job, a promotion, or an apprenticeship.
- There is a financial need and the applicant is unable to afford to continue to occupy their current home (a financial assessment will be carried out to ensure the applicant cannot afford to own or rent an alternative property in the private sector).
- This will include those Council tenants (whose tenancy started prior to September 2011), who are under-occupying, and who have been negatively affected by the changes to Housing Benefit under the Welfare Reform Act.

16.2g Care Leavers Requiring a Move to Independent Living.

- Care leavers who are unintentionally homeless are likely to have a priority need for re-housing under the homelessness legislation. However, in an effort to plan in advance to meet the needs of those known to be due to leave care, medium priority will be awarded to those care leavers with a Borough connection to West Lancashire. Should the applicant not be accommodated and threatened with homelessness within 56 days, a homelessness application will be processed. This award will be made by the Housing Options Team following liaison with Social Care.
- Applicants leaving the Birchwood Centre following a period of supported living.

16.2h Applicants who no longer require the disabled adaptations in their home.

Customers who release an adapted property where the tenant does not require their current home and will therefore be releasing an adapted property by moving.

16.2i British Armed Forces.

Those who:

- are being discharged from the British Armed Forces in the next 6 months
- formerly served in the regular forces in the 5 years preceding their application
- have recently ceased, or will cease to be entitled, to reside in accommodation provided by the Ministry of Defence following the death of that person's spouse or civil partner who has served in the regular forces and whose death was attributable (wholly or partly) to that service, or
- are serving or have served in the reserve forces and are suffering from a serious injury, illness or disability which is attributable (wholly or partly) to the person's service.

16.2j Social/Welfare.

Those applicants who have a significant need to move which is not covered elsewhere in the policy; this award will only be considered in exceptional circumstances.

The decision to award this level of priority rests with the Tenancy Services Manager, or a suitably experienced officer who has been delegated this task.

17.0 Band C – Medium Priority

- Applicants living with family/friends or lodging with no security of tenure but with no other housing need.
- Those renting in the private sector who have been served with notice to quit.
- Those who are owed the homelessness prevention duty who would not fall into one of the priority need groups outlined in 16.2a.
- Those assessed as being intentionally homeless with or without a priority need and eligible for an offer of accommodation.
- Those applicants who have refused 1 reasonable offer of accommodation in the discharge of a homelessness duty.

18.0 Band D – Low Priority

- Those who occupy mobile homes on residential caravan parks and have no other housing needs.
- Private rented tenants with no other housing needs.

19.0 Band E – No Priority

- Secure Council or Housing Association tenants with no other housing need.
- Applicants who would qualify for a higher band but have the financial ability to resolve their own housing need by purchasing a suitable property, renting in the private sector or having adaptations carried out to their current home.
- Applicants who have given up a secure property within the 12-months prior to the application who did not have a good reason for doing so.
- Those applicants who were in Band A or B and have refused 3 reasonable offers of accommodation from the housing register.
- Any applicant who has been assessed as being unsuitable to be a tenant and has had 'reduced priority' awarded to their application.
- Those without a Borough connection. The only exceptions to this are:
 - i. Members of the British Armed Forces. Armed forces personnel without a Borough connection will be prioritised according to their housing need but not awarded additional preference under section 16.2.
 - ii. Those who are accepted as homeless having fled violence or harassment from another area.
 - iii. those who are able to provide proof of their "need" to move into the area and demonstrate why this "need" cannot be satisfied in their current location e.g. for employment reasons

20.0 Deliberately Worsening Housing Circumstances

Where there is clear evidence that an applicant has knowingly contributed to the worsening of their circumstances then no priority will be given. Examples of this include but are not limited to:

- a) Selling a property that is affordable and suitable for the applicants needs in order to qualify for a higher band.
- b) Moving from a secure tenancy to insecure or overcrowded accommodation.
- c) A family giving up an affordable and suitable private rented tenancy which they are able to maintain, to move in with other relatives, creating a situation of overcrowding and sharing of bathroom/kitchen and/or a split household.
- d) An applicant requesting or colluding with a landlord or family member to issue them with a Notice to Quit.
- e) An applicant gives up settled accommodation in order to move into less settled or overcrowded accommodation.
- f) An applicant deliberately overcrowds their property by moving in friends and/or other family members who have never lived

together previously and/or have not lived together for a long time, then requests re-housing to larger accommodation.

21.0 Change of Circumstances

If an applicant's circumstances change or they move address, their application will be re-assessed and they will be placed in the most appropriate band by the date they were awarded the new banding. Where the banding would not change, the original date awarded will remain.

If by changing their circumstances applicants would go into a higher priority band, then an assessment will be made to determine whether the applicant has knowingly contributed to a worsening of their housing situation. If they have then the application will remain in the band they were placed in before their circumstances changed.

22.0 Allocation Process

22.1 Lettings Criteria:

Properties will be allocated based on the applicant's preference and the property type and size they are entitled to under the policy. The lettings criteria can be found at Appendix 3.

A property will not be allocated to an applicant if it would be so overcrowded that it failed the statutory overcrowding test.

Applicants may be offered properties that are larger than the household needs if there are no bids from suitable sized families. This would be subject to an assessment of affordability.

Some properties have been classified as lettings to those aged over 40. These properties will be let sensitively due to the nature of the accommodation. Each application will be considered on its own merits.

New tenants will be allowed pets in accordance with the Council's Pet Policy.

Applicants in Independent Living housing schemes, who are in Band E because their accommodation meets their housing needs will not be considered for offers of accommodation in the same or similar schemes.

22.2 Local Lettings Policies.

The Head of Housing Services may also agree to Local Lettings policies to ensure a balanced mix within Council accommodation. This

can include setting minimum age limits for certain property types, adjusting the number of family homes let to families with children where there is a high concentration of children in a particular area, or giving preference to local people or those who are economically active.

Local Lettings policies may apply to new build and redevelopment schemes.

As local lettings policies are subject to frequent review and change they are not listed in this document. A copy of any current policies in place can be found on the West Lancs HomeFinder website: www.westlancshomefinder.co.uk

When we advertise properties within a local lettings scheme, we will make this clear in the advert.

22.4 Allocation Decisions.

The Allocation of Housing (Procedure) Regulations 1997, regulation 3 provides:

- 1) as regards the procedure to be followed, an authority's allocation scheme shall be framed in accordance with the principle prescribed in this regulation.
- 2) a member of an authority who has been elected for the electoral division or ward in which:
 - a) the housing accommodation in relation to which an allocation decision falls to be made is situated, or
 - b) the person in relation to whom that decision falls to be made has his sole or main residence, shall not, at the time the allocation decision is made, be included in the persons constituting the decision-making body.

All procedures under this Policy other than allocations will be carried out by a Housing Options Advisor unless otherwise stated.

Elected members will not be involved in the allocation process. This does not exclude elected members from assisting a constituent with a housing related query or providing support in making an application.

23.0 Adapted Dwellings

Where a social rented dwelling has been built or adapted for a disabled person's use it will normally be offered first to applicants from the Housing Register who have a disability and who may benefit from the

particular type of adaptations made. Adapted properties will not be allocated to non-disabled persons if bids have been received from suitable applicants.

Significantly adapted properties may be allocated outside the HomeFinder scheme and offered to an applicant who requires the adaptations through direct matching. Should an applicant refuse such an offer, it will not count towards the 3 reasonable offers, which are normally made.

Applicants who are currently living in Council accommodation which has been significantly adapted to meet their needs will not be considered for an offer of any property that has not already been adapted. Exceptions will apply where further adaptations are required and these cannot reasonably be done in the current home. These applicants will not normally qualify for any additional priority for under occupation. Each case will be considered on an individual basis.

24.0 Local Connection Policy

Section 166A(6) Housing Act 1996 enables housing authorities to allocate accommodation to people of a particular description, whether or not they fall within the reasonable preference categories.

24.1 Local Connection Preference.

There is particular strain on social housing for rent in some areas of the Borough. These areas include small villages where there is little Council accommodation. In such areas it can be difficult for people with a local connection to remain there or to move there. Low income groups are particularly affected especially where house prices and private sector rents are high making affordability of homes an issue.

The Council wishes to support and assist the development and retention of stable local communities. To aid this policy the Council wants to provide reasonable preference to applicants for accommodation that have "local connections" with a particular housing area. At the same time the Council wants to ensure that appropriate priority is given to others with housing needs that have expressed a choice or preference for accommodation in the district.

In the areas set out in Appendix 1 the Council will seek to give preference to applicants with local connections over those without a connection in the same level of housing need i.e. Band.

All vacancies in these areas will be advertised as normal, applicants who satisfy the Local Connection criteria for the area in which the vacancy is located, will be given preference over those applicants with

the same level of housing need, i.e. the same band who cannot demonstrate a Local Connection to the area.

In areas where no preference is given to applicants with a local connection, then offers will be made solely in accordance with the normal procedure.

24.2 Review of Local Lettings Procedures

In order to ensure the best use of Council accommodation, the Tenancy Services Manager is authorised to review and if necessary adjust the list of housing areas within each category as set out in Appendix 1 to reflect changes in levels of housing stock or levels of demand for homes in different areas.

This may result in general needs and Independent Living accommodation within one housing area being within two different categories for local letting preference.

24.3 Local Connection Criteria

To qualify for a local connection with an allocation area an applicant must normally:

- Have lived in that area for a period of 3 out of the last 5 years prior to the date of their application; or
- Have close family who have lived in that area for a minimum of 5 years prior to the date of application and the applicant must indicate that they want to move nearer to them. Close family includes parents, children and siblings.

To satisfy the requirement of moving to be near close family, the applicant must be moving into the district from another local authority area or must currently live at least 3 miles away from the family member they are moving to be near.

An applicant can be considered to have a local connection to unlimited housing areas within the district as long as they satisfy the local connection criteria.

However, where an applicant applies to the housing register and initially satisfies the local connection criteria but subsequently falls outside of the criteria before an allocation is made, the local connection preference will be removed from the application. For example, by the time the allocation is made the applicant is no longer considered to have been resident in the district for 3 out of the last 5 years.

The Tenancy Services Manager is authorised, in exceptional circumstances and where reasonable, to assess persons who do not meet the above criteria as qualifying for a local connection.

25.0 Offers of Accommodation

25.1 Short-listing.

Expressions of interest will be placed in order of priority i.e. from Band A through to Band E. Applicants with the enhanced 'Plus' status for Homelessness will appear above those applicants with the same level of housing need, i.e. in the same band who are not at risk of homelessness. Where the shortlist contains more than one applicant in a band, the date that the applications were placed into that band will be used to prioritise them.

Where the vacancy is in a Local Connection area, expressions of interest will be placed in order of priority i.e. from Band A through to Band E. Applicants with the Local Connection to the area in which the property is located will appear above those without a local connection with the same level of housing need. Where the shortlist contains more than 1 applicant with a local connection 'Plus' status the date that the applications were placed into that band will be used to prioritise them.

In cases where no bids are received from applicants meeting the local connections criteria in the highest band on the shortlist, offers will be made in the normal manner based upon priority need and date order. Any preference for a local connection may only be given where the property advertised is of a type and size appropriate to the applicant's needs.

Where properties are targeted at specific customers, they will be given priority for that type of accommodation e.g. accessible accommodation for customers with disabilities.

If an applicant is ranked first for more than one property and provided the lettings criteria are met, they will be contacted to make a decision about which property they wish to accept subject to viewing. If the Council is unable to make contact it will determine which property should be offered.

25.2 If an applicant on the shortlist is considered not to be eligible or qualifying, they will be 'skipped' and an offer will be made to the next applicant. Applicants may be skipped if for example:

- If they have failed to maintain regular repayments of rent, there are former tenant arrears or a recharge debt.
- If a current tenant needs to complete repairs identified as their responsibility.
- If an applicant bids for a property that does not meet their specified health needs.

- If an applicant's position on the shortlist is due to their employment and this status has changed.
- If an applicant's position on the shortlist is due to their local connection with an area and this is incorrect or has changed.
- If the applicant has already bid for another property and this has been offered to them.
- If the property is adapted and the applicant does not need those specific adaptations.
- If the property is not adapted and the applicant needs specific adaptations.
- If the reason for the move is domestic abuse or harassment and the move is not far enough from the area to resolve the issues.
- If no response has been received when the applicant has been contacted by telephone or letter, despite reasonable efforts.
- If the applicant would be reasonably be unable to afford the rent on the property.

The offer will be made first to the applicant in the highest priority band who has had that priority the longest. If the offer is not accepted the property will be offered to the next applicant in the band.

If an offer is not accepted by any of the applicants in a priority band then it will be offered to applicants in the next lower band on the same basis.

25.3 Properties will normally be offered on a Secure lifetime tenancy in accordance with our Tenure Policy. If the tenancy is new, the first year will be an Introductory Tenancy.

25.4 Reasonable Offers.

Offers will be considered reasonable if:

- The applicant has expressed an interest in the property by placing a bid.
- The property attributes were correctly detailed in the advert.
- The size of the accommodation is suitable.
- The design of the property meets the individual's medical needs.
- The household would not be at risk of violence or harassment.

26.0 Refusal of Offers

Applicants will normally be required to decide on an offer of accommodation within 2 days of being notified of the offer.

Waiting list applicants who have refused 3 reasonable offers will have their applications re-banded to Band E.

Applications will not normally be cancelled for refusal of offers. They will remain in Band E until they receive an offer that they accept. Applications will only be cancelled if an applicant fails to respond to letters asking if they wish to stay on the register or it is cancelled in the annual system review.

In exceptional circumstances where an applicant has bid on, been offered, viewed and refused number of suitable properties with no valid reason, the Tenancy Services Manager will have discretion to close the application.

In cases where a household has been accepted as unintentionally homeless with a priority need and placed in bands A or B, 1 offer will be made to discharge the Council's statutory duty. Where this offer is refused, the application will be re-banded to Band C and treated as a waiting list application.

The Council aims to provide accommodation to homeless applicants in an area that they have selected, as the tenancy is more likely to be sustained. However, owing to the low turnover in certain areas, the need to help people move on from temporary accommodation, and discharge of the homeless duty, offers of reasonable accommodation may have to be made in an area, which has not been chosen but is reasonably accessible and available at an earlier date.

27.0 Exceptional Circumstances

The Council accepts that there may be circumstances that warrant exceptions to the normal allocation policy. The Tenancy Services Manager is therefore authorised to assess individual cases and where appropriate and reasonable to do so decide that an exception be made to the normal allocations policy. Such cases may include exceptions to:

- The application of the local lettings policy.
- The application of the local connections criteria.
- The priority band applied to an application.
- The offer of accommodation to an applicant.

Exception circumstances would include but not be limited to Public protection cases, situations where a move would assist the Council in the effective management of its homes, or in order to make best use of housing stock for example where a property has been significantly adapted or has unusual attributes.

28.0 Nominations to Private Registered Providers

The Council has several nomination agreements with Registered Providers and will always endeavour to submit nominations for vacancies when requested. These properties will be advertised and shortlisted in accordance with the normal allocations scheme. The Council will provide details of the three highest placed applicants to the Landlord who may conduct their own pre tenancy checks prior to making any offer of accommodation.

29.0 Review of the Housing Register

The housing register will be reviewed every 12-months. Applicants will be required to confirm that they wish to remain on the register and advise the Council if their circumstances have changed. Applicants who fail to respond to this review will be removed from the housing register. They will have to make a fresh application to re-join the scheme if they wish to be considered for accommodation in the future.

On completion of the online application applicants will be advised of the information that they will need to provide e.g. photographic ID, reference, proof of child benefit. Applicants who fail to provide this evidence within 2 months will have their application cancelled and will need to reapply.

30.0 Confidentiality

We treat the information included on a housing application as strictly confidential.

We will use the data you have supplied for the purposes of your housing application. The Councils Privacy Notice details how the Council will use the personal data, who this data will be shared with and how we will store your personal data.

Applicants can designate a relative, friend, agency or other third party to act of their behalf. By supplying the representative's information on the HomeFinder application the applicant giving consent for all aspects of their application to be discussed with their representative.

31.0 Rights to Request Information and Reviews

In accordance with s166A(9) of the Housing Act 1996 (as amended), applicants have the following rights:

a) To request such general information as will enable them to assess:

- how their applications are likely to be treated under this Policy (including in particular whether they are likely to be regarded as a member of a group of people who are to be given preference by virtue of s166A(3)), and
 - whether housing appropriate for their needs is likely to be made available to them and, if so, how long it is likely to be before such accommodation becomes available
- b) To request to be informed of any decision about the facts of his or her case which has been or is likely to be taken into account in considering whether to make an allocation.
- c) To request a review of a decision under (b) above or a decision that they are either ineligible or non-qualifying.

The review process can be found at Appendix 4.

32.0 Support for Vulnerable Applicants

We aim to ensure that all applicants are able to full participate in the CBL scheme and appreciate that some customers may require some additional support to do so.

At application stage, applicants will be asked whether they require any additional help. This may include:

- Advice on using the system and technology involved.
- Nominating someone to bid on their behalf, this could be a family member or worker from a support agency. In exceptional circumstances where an applicant is unable to bid themselves and has no advocate, a system of automated bidding can be used.

APPENDIX 1

LOCAL CONNECTION AREAS

Altcar
Appley Bridge
Banks
Bickerstaffe
Halsall
Haskayne
Hesketh Bank
Newburgh
Parbold
Rufford
Scarisbrick
Tarleton
Westhead
Wrightington

APPENDIX 2

Overcrowding Assessment Guidance - The Bedroom Standard

The bedroom standard is the minimum standard against which local authorities assess overcrowding.

When assessing overcrowding, the following criteria should be taken into account:

- Married or cohabiting couples (including same sex couples) should have their own bedroom
- Each adult aged 21 years or more should have a separate bedroom
- A pair of adolescents of the same sex aged between 10 & 20 years can share a bedroom
- A pair of children aged under 10 regardless of sex can share a bedroom
- Any unpaired person aged 10-20 years is paired if possible with a child under 10 years of the same sex. If this is not possible, they should be given a separate bedroom. The same applies to any unpaired child aged under 10 years

In calculating the number of bedrooms available within properties the Council will treat every habitable room as a bedroom except kitchens, bathrooms and one room for use as a living room. The Council will normally consider additional downstairs rooms in houses for use as bedrooms in accordance with Housing Benefit regulations.

No more than 2 people are expected to share a room.

A pregnant woman will be assessed as requiring a room for the baby at 30 weeks of pregnancy as long as a copy of the MATB1 has been provided. Exceptions may be considered where an applicant is owed a duty under homelessness.

Where a household is experiencing difficulties with accommodating 2 very young children i.e. under 5 in a single bedroom, an additional bedroom may be allocated. This award is discretionary and will only be made following a home visit by a Housing Options Advisor.

APPENDIX 3

Lettings Criteria

<u>Property Type</u>	<u>Qualifying Groups</u>
Bedsits	Single people & couples without children
Flats/Maisonettes	Single people, couples, families with children.
Houses	Households with children where the youngest is aged 16 or under.

Households with an expectant mother are treated as though the child has been born at 30 weeks of pregnancy as long as a copy of the MATB1 has been provided.

In determining eligibility for a house, we would consider whether the applicant is the primary carer for a child, a number of factors can be taken into account during this assessment including the time that the child spends living with the applicant and whether the applicant is designated the primary carer for benefit purposes i.e. are they in receipt of child benefit etc. All decisions will be made on a case by case basis.

Independent Living housing bungalows and Independent Living schemes are reserved for those over 55 years of age who need the added benefits of a safe and secure environment that supports and sustains their long term health and wellbeing. For Independent Living flats not in a communal scheme, applications will be considered from households where all members are over 50.

In exceptional circumstances applicants under these age limits, with identified support needs which cannot be met in general needs accommodation, may be considered for Independent Living housing. This decision will be taken in consultation with the manager responsible for the management of the Councils Independent Living housing schemes

For those people with some levels of support needs the Council will work with appropriate agencies to achieve independent and sustainable tenancies.

Number of bedrooms

The number of bedrooms allocated will be dependent on the size of the household taking into account the bedroom standard.

The following criteria will be followed:

- Each married/co-habiting couple will require a bedroom

- Each adult aged 21 years or more will require a bedroom
- Each pair of children of the same sex aged between 10-20 will require a bedroom
- Each pair of children aged under 10, regardless of sex, require a bedroom (once one child reaches the age of 10, they can be paired with another person of the same sex who is aged 20 or under. Where this is not possible, the unpaired child will require a separate bedroom).

Households with an expectant mother are treated as though the child has been born at 30 weeks of pregnancy as long as a copy of the MATB1 has been provided.

Where there is a demonstrated need for an additional room for a carer or medical equipment (as evidenced by medical information), an additional bedroom can be allocated.

Where a household is experiencing difficulties with accommodating 2 very young children i.e. under 5 in a single bedroom, an additional bedroom may be allocated. This award is discretionary and will only be made following a detailed assessment.

As the Council has limited availability of 2 bedroom houses; those households with two children and assessed as eligible for 2 bedrooms under the above criteria will be allowed to bid on both 2 and 3 bed properties, however all offers would be subject to an affordability assessment.

As the Council has limited availability of 1-bedroom flats; single person and couples assessed as eligible for 1 bedroom under the above criteria will be allowed to bid on both 1 and 2 bed flats, maisonettes and bungalows (subject to age restrictions), however this would be subject to an affordability assessment.

APPENDIX 4

The Review Process

The Original Decision

Normally within 3 working days of making a decision on a housing application, the officer dealing with the case will notify the applicant in writing of that decision.

The decision letter will state;

- The reasons for the decision;
- The right to request a review of that decision;
- The time allowed to make a request for a review (normally 21 days from the date of the decision);
- The name of the officer to whom the request for review should be made

Where the applicant requests a review, the Review Procedure should be followed.

Review Procedure

Written request for a review has been received within the timescale allowed (normally 21 days).

Within 2 working days of the written request being received, a Review Officer will be appointed (this will be a senior officer who has not taken part in the original decision).

Within 10 working days of their appointment, the Review Officer will;

- Write to the applicant stating that the review request has been received;
- Advise the applicant of the identity of the reviewing officer;
- Inform the applicant that they or someone acting on their behalf can make representations in writing in connection with the review;
- Further details of the review procedure;
- The timescale within which the review will be completed (8 weeks from the day on which the review is made)

There is no further right of appeal if the applicant is not satisfied with the decision on review.

Any further challenge would have to be through the courts by way of judicial review.

Equality Impact Assessment Form



Directorate: Housing & Inclusion	Service: Housing Management
Completed by: Nicola Bradley	Date: 23.11.22
Subject Title: Housing Allocations Policy	
1. DESCRIPTION	
Is a policy or strategy being produced or revised:	Yes <i>*delete as appropriate</i>
Is a service being designed, redesigned or cutback:	No
Is a commissioning plan or contract specification being developed:	No
Is a budget being set or funding allocated:	No
Is a programme or project being planned:	No
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty (Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations):	Yes
Details of the matter under consideration:	Update to the Councils Housing Allocations Policy
<p><i>If you answered Yes to any of the above go straight to Section 3</i></p> <p><i>If you answered No to all the above please complete Section 2</i></p>	
2. RELEVANCE	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No* <i>*delete as appropriate</i>
If Yes , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered Yes go to Section 3</i>	
If you answered No to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	
3. EVIDENCE COLLECTION	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	
If the work being carried out relates to a	

<p>universal service, who needs or uses it most? (Is there any particular group affected more than others)?</p>	<p>The Policy will be applied to existing and future housing applicants and will not disadvantage any one group in terms of their housing needs and our ability to meet them.</p>														
<p>Which of the protected characteristics are most relevant to the work being carried out?</p> <p>Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity</p>	<p>Yes No Yes No No No No No Yes</p>														
<p>4. DATA ANALYSIS</p>															
<p>In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?</p>	<p>The Councils Allocations Policy aims to promote equality of opportunity and allocate social housing within the borough to those applicants in most housing need.</p> <p>The following table shows the breakdown in terms of age of main applicant. This shows that there is a fairly even distribution in terms of the age groups wishing to access housing.</p> <table border="1" data-bbox="847 1310 1331 1615"> <thead> <tr> <th>Age</th> <th>Number of applicants</th> </tr> </thead> <tbody> <tr> <td>16-17</td> <td>1</td> </tr> <tr> <td>18-24</td> <td>167</td> </tr> <tr> <td>25-35</td> <td>394</td> </tr> <tr> <td>36-60</td> <td>507</td> </tr> <tr> <td>60+</td> <td>270</td> </tr> <tr> <td>Grand Total</td> <td>1339</td> </tr> </tbody> </table> <p>7.5% of applicants have a physical disability and require and adapted property.</p> <p>83.7% of applicants identify as White British, with 90.1% of applicants being UK nationals.</p>	Age	Number of applicants	16-17	1	18-24	167	25-35	394	36-60	507	60+	270	Grand Total	1339
Age	Number of applicants														
16-17	1														
18-24	167														
25-35	394														
36-60	507														
60+	270														
Grand Total	1339														
<p>What will the impact of the work being carried out be on usage/the stakeholders?</p>	<p>The proposed changes</p>														

	<ul style="list-style-type: none"> • aim to increase the number of allocations to those in most need by updating the level of priority given to those who are homeless. • Remove Community contribution criteria which is currently disadvantages those who are unable to work due to disability, caring responsibility etc. • assist expectant parents in securing suitable accommodation prior to the birth of their child, households with an expectant mother will now for the purposes of assessing overcrowding be treated as though the child has been born at 30 weeks of pregnancy.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	Results of survey have been used to highlight areas of the policy that need to be updated.
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	Data relating to current live applications Data relating to the allocations of housing
If any further data/consultation is needed and is to be gathered, please specify:	12 week public consultation to be carried out with customers and other interested agencies and support groups.
5. IMPACT OF DECISIONS	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	There will be a positive effect on homeless applicants in terms of being given more priority which will relieve their homelessness more quickly. There will be a positive impact on those who are unable to work due to disability. Where appropriate pregnant applicants will be considered for additional priority when an additional room would be required for the new baby.
6. CONSIDERING THE IMPACT	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact,	There is no negative impact.

explain why this is the case (e.g. legislative or financial drivers etc.).	
What actions do you plan to take to address any other issues above?	No actions <i>If no actions are planned state no actions</i>
7. MONITORING AND REVIEWING	
When will this assessment be reviewed and who will review it?	1 year after implementation by Tenancy Service Manager

Example Equality Service Monitoring Form



Equality Service Monitoring

To help us monitor the accessibility and effectiveness of our services, please complete the monitoring form overleaf.

Why are we asking for this information?

Under the Equality Act 2010, as a public authority, we are required to demonstrate that we are paying 'due regard' to issues that affect all sections of the community across the functions and services that we carry out as an organisation. Monitoring who is using and who is not using our services is a big part of this.

The information we collect helps us to improve our services. It shows us if some people are not making the most of our services, and where we need to make changes to them.

What happens to the information?

Some people worry about giving information in case it should fall into the wrong hands. There are strict laws (Data Protection Act 1998) to make sure that we protect the information we collect and to deal with it responsibly. Our service managers use the information we collect to find out what they need to do to improve their services, policies and strategies so that they meet the needs of all our residents and other stakeholders.

Aren't some of the questions a bit personal?

It may seem that we are being nosy, but we ask everyone the same thing. We understand that you might be protective of your personal information, but if we don't know who is using our services, it is harder for us to deliver them appropriately.

Equality Service Monitoring Form



Please complete this form to help us continue to improve our services

	<i>Please write in answer or tick box</i>						
1. What is your full home postcode? e.g. L39 2DF							
2. What was your age on your last birthday?							
3. Are you a deaf person or do you have a disability? (The Equality Act 2010 defines a disabled person as someone who has a physical or mental impairment which has a substantial and long term adverse effect on his or her ability to carry out normal day- to- day activities)	<input type="checkbox"/> Yes <input type="checkbox"/> No						
4. Are you... Is your gender the same as the gender you were born?	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Yes <input type="checkbox"/> No						
5. What is your religion?	<input type="checkbox"/> Baha'i <input type="checkbox"/> Buddhist <input type="checkbox"/> Christian <input type="checkbox"/> Hindu <input type="checkbox"/> Jewish <input type="checkbox"/> Muslim <input type="checkbox"/> Sikh <input type="checkbox"/> No religion/belief Any other religion/belief – please write in below						
6. What is your sexual orientation?	<input type="checkbox"/> Bisexual <input type="checkbox"/> Gay man <input type="checkbox"/> Heterosexual / straight <input type="checkbox"/> Lesbian / gay woman						
7. Which best describes your ethnic background? <table border="0"> <tr> <td style="vertical-align: top;"> A White <input type="checkbox"/> English/Welsh/Scottish/Northern Irish/British <input type="checkbox"/> Irish <input type="checkbox"/> Gypsy or Irish Traveller <input type="checkbox"/> Any other White European background, please write below: <input type="checkbox"/> Any other White background, please write below: </td> <td style="vertical-align: top;"> B Mixed/multiple ethnic groups <input type="checkbox"/> White and Black Caribbean <input type="checkbox"/> White and Black African <input type="checkbox"/> White and Asian <input type="checkbox"/> Any other Mixed/multiple ethnic background, please write below: </td> </tr> <tr> <td style="vertical-align: top;"> C Asian/Asian British <input type="checkbox"/> Indian <input type="checkbox"/> Pakistani <input type="checkbox"/> Bangladeshi <input type="checkbox"/> Chinese <input type="checkbox"/> Any other mixed/multiple ethnic background, please write below: </td> <td style="vertical-align: top;"> D Black/African/Caribbean/Black British <input type="checkbox"/> African <input type="checkbox"/> Caribbean <input type="checkbox"/> Any other Black/African/Caribbean background, please write below: </td> </tr> <tr> <td></td> <td style="vertical-align: top;"> E Other ethnic group <input type="checkbox"/> Arab <input type="checkbox"/> Any other ethnic group, please write below: </td> </tr> </table>		A White <input type="checkbox"/> English/Welsh/Scottish/Northern Irish/British <input type="checkbox"/> Irish <input type="checkbox"/> Gypsy or Irish Traveller <input type="checkbox"/> Any other White European background, please write below: <input type="checkbox"/> Any other White background, please write below:	B Mixed/multiple ethnic groups <input type="checkbox"/> White and Black Caribbean <input type="checkbox"/> White and Black African <input type="checkbox"/> White and Asian <input type="checkbox"/> Any other Mixed/multiple ethnic background, please write below:	C Asian/Asian British <input type="checkbox"/> Indian <input type="checkbox"/> Pakistani <input type="checkbox"/> Bangladeshi <input type="checkbox"/> Chinese <input type="checkbox"/> Any other mixed/multiple ethnic background, please write below:	D Black/African/Caribbean/Black British <input type="checkbox"/> African <input type="checkbox"/> Caribbean <input type="checkbox"/> Any other Black/African/Caribbean background, please write below:		E Other ethnic group <input type="checkbox"/> Arab <input type="checkbox"/> Any other ethnic group, please write below:
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	E Other ethnic group <input type="checkbox"/> Arab <input type="checkbox"/> Any other ethnic group, please write below:						
<p><i>Thank you for completing this form</i></p>							



LSC: 18th January 2023

CABINET: 24th January 2023

EXECUTIVE OVERVIEW &
SCRUTINY COMMITTEE:
12th January 2023

Report of: Corporate Director of Transformation, Housing & Resources

Relevant Portfolio Holder: Councillor Pryce-Roberts

Contact for further information: Nicola Bradley (Ext. 5296)
(E-mail: nicola.bradley@westlancs.gov.uk)

SUBJECT: DRAFT GARAGE ALLOCATIONS & MANAGEMENT POLICY

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To consider and agree the Garage Allocations & Management Policy

2.0 RECOMMENDATIONS TO CABINET

2.1 That the Garage Allocations & Management Policy attached at Appendix 1 of the report be approved

2.2 That the Head of Housing, in consultation with the relevant Portfolio Holder, be given delegated authority to make minor updates and changes as required to this policy.

3.0 RECOMMENDATIONS TO EXECUTIVE OVERVIEW & SCRUTINY COMMITTEE

3.1 That the contents of the policy be considered by the committee.

4.0 BACKGROUND

4.1 The Council owns and manages 1554 garages and several garage sites where tenants rent the site and are able to erect their own garage structure on the plot.

4.2 Historically, garages have been allocated to applicants based on the length of time that the applicant has been on the garage waiting list.

5.0 CURRENT SITUATION

5.1 The Council currently has approximately 350 empty garages. The Draft Garage Allocations & Management Policy outlines our approach to how these will be allocated and how garage applications will be processed.

5.2 Whilst many areas have an oversupply of garages and therefore there is low demand for the vacancies, there are also some areas where garage stock is very low so when a vacancy arises it can be very sought after. It is therefore important to have a clear, fair and balanced policy in place.

5.2 Whilst the primary aim of the policy is to outline the Allocations criteria, the draft policy incorporates our existing approach to the management of garages.

5.3 Prior to formulating the draft policy a consultation took place with existing garage tenants and applicants currently on the garage waiting list.

6.0 HIGHLIGHTS FROM CONSULTATION

6.1 Whilst 79.1% of respondents felt that the way we currently advertise garages was fair, when asked to rank the factors they held most important when allocating a garage the proximity of the applicants home to the garage was important. The table below shows the Average ranking

Currently we allocate garages based on length of time people have waited. We want to understand what factors you think are most important when allocating a garage. (Rank (1) being the most important to (8) being the least important)

OPTIONS	AVG. RANK
The applicant lives in the same street as the garage	2.61
The length of time an applicant has waited for a garage	2.73
The applicant lives in the same area as the garage. e.g., applicant lives in Ormskirk and wants to rent a garage in Ormskirk	3.63
The applicant is a resident of West Lancashire	4.52
The applicant intends to use the garage to keep a car in	4.97
The applicant has a diagnosed mobility issue	5.04
The applicant is a Council tenant	5.66

The applicant operates a business in the area	6.84
---	------

- 6.2 Only 16.4% felt that we should continue to administer garage allocations through the Homefinder system, while 76.1% of respondents would prefer the Council to identify the applicant next in line for a garage in that area and contact the customer direct.

7.0 SUMMARY OF PROPOSED CHANGES

- 7.1 The Draft Policy moves away from prioritising applicants purely based on the length of time that they have waited for a garage and recognises the importance of giving preference to those who live in close proximity to a vacant garage. Waiting time would still be used to prioritise those within each of the Priority groups.
- 7.2 The Policy aims to develop a system which customers see as being fairer, whilst retaining its simplicity to understand and to operate.
- 7.3 As part of the implementation of the new policy it is intended to move away from the current system of advertising garages via the Homefinder website which requires applicants to complete a detailed registration process before submitting a garage application, with the applicant then needing to check the website on a regular basis and place bids. In response to customer feedback the new process would involve the Lettings team contacting applicants when they are next in line for a garage to make an offer. This means that once the applicant has submitted their original application, they do not need to do anything further.

9.0 SUSTAINABILITY IMPLICATIONS

- 9.1 The introduction of this Policy will create a more flexible, proactive approach to letting empty garages. A reduction in the number of empty garages will discourage antisocial behaviour and crime and improve the appearance of our housing estates.

10.0 FINANCIAL AND RESOURCE IMPLICATIONS

- 10.1 Any reduction in the number of empty garages will generate income and support the HRA Business Plan.

11.0 RISK ASSESSMENT

- 11.1 The actions referred to in this report are covered by the scheme of delegation to officers and any necessary changes have been made in the relevant risk registers.

12.0 HEALTH AND WELLBEING IMPLICATIONS

12.1 There are no health and wellbeing implications arising from this report.

Background Documents

*There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

* There is a direct impact on members of the public, employees, elected members and / or stakeholders, therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report, the results of which have been taken into account in the Recommendations contained within this report

Appendices

1. Draft Garage Allocations & Management Policy
2. Equality Impact Assessment

WEST LANCASHIRE BOROUGH COUNCIL
GARAGE ALLOCATIONS & MANAGEMENT POLICY



November 2022

1. Introduction

The Garage Allocations Policy outlines West Lancashire Borough Councils approach to the allocation and management of the garages it owns.

The Councils Housing Service manages approximately 1500 garages, located across the borough.

This policy sets out the Council's general approach to the management of garages including

- General use
- Allocation and Lettings
- Succession rights
- Rent and charges
- Terminating of agreements
- Insurance
- Disposals

2. Objectives

This policy will set out a transparent process for the allocation of garages managed by the Council which will be carried out in a reasonable and fair manner following the criteria set out in this policy. The policy also aims to ensure the garage stock is maintained effectively through day to day management ensuring optimisation of letting and income while having in place an effective asset review approach.

The Policy aims to:

- Provide an easy to understand fair and transparent garage allocations system
- To optimise income generation by ensuring all garages are let within a timely manner as far as possible.
- Support the management of parking issues within neighbourhoods by endeavouring to provide an alternative parking solution
- Ensure that the garage stock is effectively managed

3. Scope of the Policy

This Policy applies to all applications for Council owned garage stock (where the garage structure is owned and maintained by the Council and a weekly rent is charged)

The Council also owns some garage sites (where the garage structure is owned and maintained by the tenant and a yearly ground rent is charged). These will be covered separately in the Section 15 of this policy.

This policy does not apply to homes with garages where the garage forms part of the property lettings agreement (usually where the garage is within the curtilage of the property). These will continue to be let as part of the accommodation and not as a separate rental.

4. Garage Allocations:

Anyone aged 18 and over who lives or works in West Lancashire can apply for a garage.

Any applicant who is in rent arrears or has other housing related debts will not be eligible for a garage.

Applicants can:

- express an interest in any garage in the Borough.
- apply for up to 3 Garage Locations on their application. As there are sometimes several different garage blocks within a street, the street as a whole will usually equate to the Garage Location.

Priority will be given those applicants who live in the area where the garage is located.

When allocating a garage, priority for letting garages will be in the following order:

Priority 1: Local Residents (within 0.5km radius of the garage site)

Priority 2: Applicants who live outside a 0.5km radius of the garage site who are applying for first garage

Priority 3: Those applicants who already have a garage (regardless of where they live)

Within the priority groups, applicants will be ranked by their date of application, with the applicant who has been waiting longest being offered a garage first.

When allocating a garage, the Lettings Team will identify the applicant who has been waiting the longest in Priority Group 1. Where there are no suitable applicants in Priority Group 1, applicants in Priority Group 2 will then be considered in order of their date of application.

Applicants will be contacted by email, telephone or letter to advise of an offer. Applicants will normally be required to decide on an offer within 2 days of being notified. If the applicant with the highest priority does not respond or refuses the offer, the garage will be reallocated to the next person on the waiting list.

The Council aims to allocate all its garages. There may be exceptions where a garage may remain empty, included but not limited to refurbishment, development requirements, or because they are beyond economic repair

5. Exceptional circumstances

The Council accepts that there may be circumstances that warrant exceptions to the normal garage allocation criteria. The Tenancy Services Manager is authorised to assess individual cases and where appropriate and reasonable to do so may make an offer outside the normal allocations policy. Such cases may include but are not limited to:

- Decants from existing garages either due to redevelopment
- Decants from an existing garage due to repair/condition of garage
- Where an applicant has exceptional need for a particular garage for example due to a disability

6. Tenancy

On accepting the offer of a garage tenancy, the applicant must attend the Customer Service Point to sign a garage tenancy agreement which details the obligations of holding a garage tenancy.

Applicants who accept an offer of a garage will normally be expected to sign for the tenancy within 2 days. If they fail to do so the offer will be withdrawn, and the garage reallocated.

The Council will not issue joint tenancies to a garage agreement.

7. Succession & Assignment

On the death of a tenant the garage tenancy will end. However, the tenancy may be offered to a surviving member of the tenant's family who lived with them at the time of their death. Proof of residency for e.g. utility bill, bank statement etc, will be required before re-letting the garage. Any rent arrears outstanding on the garage tenancy will pass to the successor, who will be required to clear the debt or make an agreement to repay the debt over an agreed period of time.

Requests for a mutual exchange will be considered on a case by case basis.

8. Use of the garage

Garage tenants can use the garage for the storage of taxed and roadworthy private motor vehicles. Garages can also be used for storage purposes e.g. tools and garden equipment.

Garage tenants will not be permitted to:

- Operate a business from their garage.
- Store any noxious or flammable material at the garage other than fuel in the tank of a motor vehicle
- Run the engine of the motor vehicle while it is in the garage unless entering or leaving the garage
- Use, or permit others to use the garage for any act that may cause any nuisance, discomfort or annoyance to neighbouring residents, tenants or users of other garages
- Use, or permit others to use the garage for illegal or immoral purposes.
- Assign or sub-let the garage or any part of it to another person(s) or organisation(s)
- Make any additions or structural alterations to the garage
- Paint the garage door without written permission from the Council.
- Display or permit others to display on the garage any advertisement, notice or name-plate
- Store or keep any animals birds or livestock

9. Rents

Garages are let on a weekly basis at a rent that will be reviewed annually and published accordingly. The rent may be varied by giving the tenant of a garage four week's written notice or more before any changes take place. Tenants who rent both a home and a garage from the Council will not be charged VAT. However, VAT will be applied to rent charges for all non-Council tenants.

Garage arrears will be dealt with in line with the Income Recovery Policy.

10. Termination

We will not normally end a garage tenancy without the tenant's agreement unless there is a breach of tenancy conditions for e.g. non payment of rent, the tenant is deceased and there is no succession, or the garage/site is required to meet the Council's strategic aims or for the efficient management of the Council's housing stock. The Council can end the tenancy by serving one week's notice to quit on the tenant.

A tenant holding a garage tenancy may terminate their tenancy with one week's written notice ending on a Sunday. This can be done by contacting the Council's Customer Services Team.

When a garage tenancy is terminated, all rent should be paid up to date, any items removed, and the garage left in a clean and tidy condition. Keys are to be returned by 10am on the Monday following the tenancy end date. If the keys are not returned or they have been lost, we will recharge the tenant for the replacement of any locks, keys and associated expenses of the same.

The outgoing tenant will be liable for the rent and for any cost incurred by the Council for clearance of items, including belongings and rubbish, which remain in the garage after termination of the notice period.

11. Insurance

The Council will insure the structure of the garage, but the tenant will be responsible for insuring their own vehicle and personal possessions together with any items stored in the garage. It is the tenant's responsibility to ensure the garage is secure and report any defects to the Council.

All items in a garage are kept at the owners risk. The Council will not accept liability for any loss or damage to vehicles or items in the garage.

12. Garage Management

A review of garages and garage sites will be carried out on a regular basis to ensure they continue to be viable assets. This review will consider alternative uses for the garages and garage sites ensuring any legislation and health and safety requirements are adhered to.

13. Demolition/Disposals

Demolition of garage blocks may be considered where the site is part of a redevelopment scheme, the block requires extensive and costly repairs and/or the majority are empty with no demand.

In these situations, the Council will take all reasonable steps to relocate existing tenants to another garage nearby.

Where the Council receives a request to purchase a garage, consideration will be given to whether:

- the prospective purchaser is the current tenant of the garage
- the garage is in the prospective purchaser's garden
- the garage forms part of a block of garages
- there is a waiting list for garages in the area

It should be noted that the Council will not normally sell garages which are part of a block of garages.

14. Repair and Maintenance

Repairs to garages can be requested in the same way as a repair to a home and timescales will vary dependant on the actual job required.

Tenants are responsible for regularly lubricating all mechanical parts of the garage doors, i.e., locks, hinges, springs etc.

Tenants are required to give employees or contractors working for the Council reasonable access in order to carry out repairs to the garage or neighbouring properties.

Where tenant is unable to use a garage for an extended period of time whilst major repairs are being carried, the Council will where possible allow the temporary use of a suitable neighbouring garage if one is empty. Requests for a refund of rent for the period the garage is under repair will be considered on a case by case basis.

15. Garage Sites

Garage sites are rented pieces of land owned by the Council where a tenant can place their own garage structure which is owned and maintained by the tenant.

The construction of any building on the site must be in accordance with appropriate planning permissions and building regulation approval.

The garage can only be used to accommodate a private motor vehicle and/or bicycle and for no other purpose. Under no circumstances will the Council permit the garage to be used in connection with the running of a business or storage of commercial vehicles.

16. Garage Site Allocation

There are a number of garage sites throughout the Borough. Anyone aged 18 and over who lives or works in West Lancashire can apply for a garage site. Garage sites will be allocated using the principles outlined in Section 4 Those wishing to rent a site can express an interest by emailing neighbourhoods@westlancs.gov.uk or telephoning 01695 577177.

17. Garage Site Charges

A yearly ground rent is charged for each garage site. Council tenants will not be charged VAT. However, VAT will be applied for all non - Council tenants.

Equality Impact Assessment Form



Directorate: Transformation, Housing and Resources	Service: Housing Services
Completed by: Nicola Bradley	Date: August 2022
Subject Title: Garage Allocations & Management Policy	
1. DESCRIPTION	
Is a policy or strategy being produced or revised:	Yes
Is a service being designed, redesigned or cutback:	No
Is a commissioning plan or contract specification being developed:	No
Is a budget being set or funding allocated:	No
Is a programme or project being planned:	No
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty (Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations):	Yes
Details of the matter under consideration:	Introduction of Garage Allocations & Management Policy
<i>If you answered Yes to any of the above go straight to Section 3</i> <i>If you answered No to all the above please complete Section 2</i>	
2. RELEVANCE	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No*
If Yes , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered Yes go to Section 3</i>	
If you answered No to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	
3. EVIDENCE COLLECTION	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	Current and prospective tenants of Council owned garages

<p>If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more than others)?</p>	<p>The Policy will be applied to existing and future garage tenants. No particular group will be impacted more than any other.</p>
<p>Which of the protected characteristics are most relevant to the work being carried out?</p> <p>Age Gender Disability Race and Culture Sexual Orientation Religion or Belief Gender Reassignment Marriage and Civil Partnership Pregnancy and Maternity</p>	<p>No No No No No No No No No</p>
<p>4. DATA ANALYSIS</p>	
<p>In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?</p>	<p>The Council has 1187 garage tenants. Anyone can currently apply for a garage tenancy and applications are prioritise on waiting time.</p>
<p>What will the impact of the work being carried out be on usage/the stakeholders?</p>	<p>The policy and associated Allocation processes will be simpler for customers reducing the action that they need to take to get a garage.</p>
<p>What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?</p>	<p>79.1% of service users have told us that they feel the current system of allocations is fair. 76.1% said that they would like the Council to approach them when they are next in line for a garage rather than having to bid.</p> <p>When asked what is most important when allocating a garage the top factors where that the applicant lived in the same street/area as the garage and the time that they had been on the waiting list.</p>
<p>What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?</p>	<p>Results of consultation carried out with garage applicants and tenants in July 2022.</p> <p>2011 Census data West Lancashire has a diverse population</p>

	<p>in terms of age and in 2020, 19.4% of the population were under 18; 58.3% were aged 18-64 and 22.3% were aged over 65 years.</p> <p>The 2011 Census showed that more than 20% of West Lancashire residents consider that their day-to-day activities are limited to some extent by a long-term health problem or a disability</p>
If any further data/consultation is needed and is to be gathered, please specify:	
5. IMPACT OF DECISIONS	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	The Garage Allocation & Management Policy will be equally applied to applicants and garage tenants, there will be no disproportionate effect on those with protected characteristics.
6. CONSIDERING THE IMPACT	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	Whilst there is no disproportionate effect on any service users, there may be exceptional circumstances around an individual case which warrant a person with protected characteristic being treated more favourably eg a person with a physical disability. The Policy allows for some discretion in these exceptional situations.
What actions do you plan to take to address any other issues above?	<p>No actions</p> <p><i>If no actions are planned state no actions</i></p>
7. MONITORING AND REVIEWING	
When will this assessment be reviewed and who will review it?	The EIA will be reviewed along with the Garage Allocations & Management Policy every 3 years



**EXECUTIVE OVERVIEW & SCRUTINY
COMMITTEE: 12 January 2023**

CABINET: 24 January 2023

Report of: Corporate Director of Place and Community

Portfolio Holder: Councillor J Wilkie

Contact for Further Information:

**Gillian Wossick, Environmental Sustainability Manager
(Ext. 3424) (E-mail: gillian.wossick@westlancs.gov.uk)**

**SUBJECT: CLIMATE CHANGE STRATEGY AND ACTION PLAN 2030: PROGRESS
UPDATE, ACHIEVEMENTS AND 2023/24 PRIORITIES**

Areas affected: Borough Wide

1.0 Purpose of the report

1.1 The report provides an update on the council's progress towards delivering the actions set out in the Climate Change Strategy (Strategy) and Action Plan 2030, and to approve the council's priorities for 2023/24.

2.0 Recommendations to Executive Overview & Scrutiny Committee

2.1 To note the contents of the report and pass any agreed comments to the Cabinet for consideration.

3.0 Recommendations to Cabinet

3.1 To note the content of the report.

3.2 To approve the priority actions for 2023/24 and to authorise a public consultation for Electric Vehicle Charging Infrastructure. This is set out in section 6. Following consideration of the agreed comments of the Executive Overview and Scrutiny Committee.

4.0 Background

4.1 The UK Government's target is to reach net zero by 2050, with an interim target to reduce emissions by 78% by 2035, compared to 1990 levels.

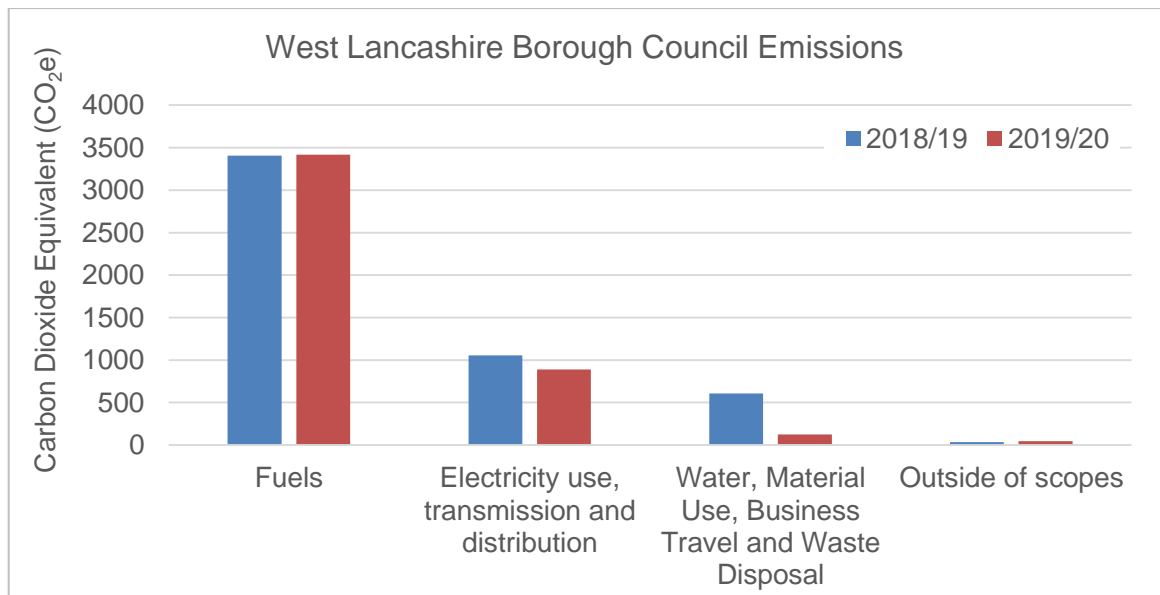
4.2 In November 2020, West Lancashire Borough Council (the Council) adopted a new 'Climate Change Strategy and Action Plan 2030' (Strategy) to assist in the

delivery of the Council's aspiration to be carbon neutral by 2030 at the latest, to be committed to climate action in other areas and to progress towards a low carbon West Lancashire.

- 4.3 The Strategy identified seven key priority areas for action, they are:
1. Delivering a carbon neutral Council,
 2. Sustainable procurement,
 3. Transport and travel,
 4. Residential buildings,
 5. Commercial activity,
 6. Community action and the
 7. Natural environment.

5.0 Current position - Progress to January 2023

- 5.1 The last progress on the strategy was reported to Cabinet in June 2021 by the Environmental Strategy Officer. Council approved the new Environmental Sustainability Manager (ESM) post, who started to work for the council in August 2022, and the new Climate Change Officer post, to work alongside the ESM, who started in January 2023.
- 5.2 For 2018/19 and 2019/20 data, One Carbon World calculated the council's carbon footprint. Overall, the data showed the council's emissions had reduced by 12% pre-pandemic. There is a gap in the data for 2020/21, therefore it is highly unlikely all the data will be available. The 2022/23 data will be calculated and will be known in Summer 2023.



- 5.3 The adoption of the 2021-23 climate change action plan identified a wide range of projects aimed at reducing the council's carbon footprint. There has been good progress against the delivery of the action plan with the following achievements:

5.3.1 Council Action

1. The proposed designs for the new leisure centres include low carbon energy. Feasibility investigations for air source heat pumps have been completed with the view to install this technology within new facilities. This will be confirmed after RIBA stage 4 (around June 2023).
2. Internal funding was sourced to develop a de-carbonisation plan for Burscough Leisure Centre and a bid was submitted to the Public Sector Decarbonisation Scheme in October 2022. The council is expected to be notified of the outcome of this bid by the end of January 2023. If successful works are expected to be completed by the end of April 2024.
3. Installation of Solar Crown lighting at both 52 Derby St and the Robert Hodge Centre as part of the refurbishment works. Updating to LED lighting as and when old lights require replacing.
4. Commuting:
 - An electric vehicle (EV) charge point was installed at Robert Hodge for staff use.
 - The EV lease scheme was introduced in September 2021. It continues to be promoted amongst staff and to mid-November 2022 14 staff have EV lease agreements in place, of these 11 are fully electric and 3 are hybrid vehicles. The scheme has petrol and diesel vehicle options, but none were leased by staff.
 - The staff Cycle to Work Scheme is advertised in recruitment packs. So far in 2022/23, 5 members of staff used the scheme to purchase bikes and cycling accessories. Between April 2020 and March 2022 18 members of staff also utilised the scheme. The Cycle to Work Scheme is enhanced with partnership from the 'Love to ride' programme.
 - The flexible working/family friendly policy allows staff to regularly utilise homeworking (helped by the introduction of Microsoft 365 software and laptops) and is regularly used by staff to work from home and to stagger their start and finish times.

All the schemes assist staff to reduce their emissions from commuting including by travelling out of peak hours and by reducing travel.
5. In 2021, the Ranger Service started to use an electric van and a charge point was installed in the garage at Beacon Country Park. The van is used for repeated short journeys around the borough and is working well.
6. In October 2022, Environmental Services trialled an electric refuse collection vehicle. The vehicle can travel up to 150 miles on a single charge. Feedback from the driver was positive. A task and finish group will investigate other vehicle options.
7. The Ranger Service published an annual events programme of well-attended walks and a series of guided walks which are available on the website.

5.3.2 Borough-Wide Action

1. The council successfully received funding for on-street electric vehicle charge points in residential areas. 31 charge points are being installed by BP Pulse in 16 locations in Skelmersdale and Ormskirk. The points are expected to be available for use by the end of March 2023.

2. The council launched the Green Tourism programme in June 2022 to assist businesses to reduce their environmental impact, save money and to achieve an internally recognised accreditation. By mid-October 2022, 8 local tourism companies had signed up to the programme and a further 6 are pending.
3. The Friends of Tawd Valley created community food growing areas in the community orchard section of the park, funds were contributed by Tesco.
4. Tawd Valley Park Community Classroom, to be completed by December 2022, has a living roof, rain garden and harvesting system. The roof will aide biodiversity and the water systems will help to slow the flow of water to alleviate flooding.
5. Community tree planting events were completed alongside the River Ribble Trust at Fairy Glen in winter 2021/22, Westend Park and at Banks in winter 2022/23.
6. A Community Climate Change Consultation was conducted in May 2021 and received 123 responses from a mixture of individuals and groups. Key findings included:
 - a. 57% were very concerned about climate change.
 - b. When asked to choose from a list of options about what they would most like to see delivered in their community, they said: rewilding and wildlife friendly planting, generating renewable energy, tree planting, and then encourage active travel (cycling/walking).
 - c. Their top priorities for reducing emissions were: generating renewable energy, followed by insulating buildings.
 - d. 77% supported reduced mowing in open spaces to encourage wildflower regeneration.

6.0 Priorities for 2023/24

- 6.1 While the council has made good progress to reduce its CO₂e emissions, further work is required, in particular to integrate good carbon management into the organisation. To achieve this, it is proposed that the council instigates a new multi-year Carbon Management Programme. In 2023/24, the priorities will be:
- i. Instigate an identification and mobilisation programme for:
 - 1) council operations
 - 2) the borough
 - ii. Carbon pathways and footprint for 2021/2 and 2022/3
 - iii. Carbon Management Embedding Matrix
 - iv. Climate Risk and Adaptation

The focus will primarily be to develop (ii. 1) a project list of CO₂e saving opportunities for the council's operations, quantify where possible and start to implement the projects. Projects for the borough will also be identified, and opportunities should be taken to integrate carbon neutrality into new and existing projects.

In order to understand the scale of the action, running alongside the identification and mobilisation programme, the:

- carbon footprints and pathways (i) will be calculated to understand the achievements to date, develop interim targets to 2030 and to enable a gap analysis to be completed.
- council will assess itself against the (iii) Carbon Management Embedding Matrix (see appendix 2) and identify the maturity level it wishes to achieve.
- Climate risk and adaptation (iv) workshop will identify current and future risks to both the council and the borough.

Projects/actions will be prioritised. Action plans will be developed for i and iii and will start to be delivered. See appendix 1 for further information.

6.2 The council has been successful in receiving funding for EV charging infrastructure. The Environmental Sustainability Team (ES Team) wishes to consult the public to gain an insight into:

1. The number of people who will rely on public charging infrastructure,
2. If additional public charging infrastructure will help them to consider getting an EV,
3. When they hope to get an EV,
4. To identify potential locations for public charge points, and
5. If they think more charge points across the borough will be good or bad.

Should the council wish to bid for further EV funding, the team intends to conduct a separate consultation with households in the immediate vicinity of the proposed sites.

7.0 Issues

7.1 In order to understand the challenge of reducing CO₂e emissions and to measure progress, the council needs to use a consultant to calculate carbon pathways for the:

- council's carbon footprint to 2030, and
- borough carbon footprint to national targets.

For both, pathway scenarios need to be calculated to show:

- business as usual, and a
- realistic carbon neutral pathway that calculates annual decreasing targets.

All pathways need to be comparable to other councils. The scenarios must be evidence-based by considering national policy drivers and local interventions. Due to the complexity of this work, the Environmental Sustainability Team are unable to complete it.

8.0 Review process

8.1 The outcomes of the new priorities in 6.1 will be reported quarterly to an internal strategic group and annually to Executive Overview and Scrutiny Committee and Cabinet.

8.2 The EV charging infrastructure consultation (6.2) results will be reported Executive Overview and Scrutiny Committee and Cabinet.

9.0 Sustainability implications

9.1 This report introduces a new programme to identify current and potential new projects to mitigate and adapt to climate change. As a result, a new Climate Change Action Plan will be developed in August 2023, and will include projects from the 2021-22 climate change action plan. The projects will assist the council to meet its carbon neutral aim in 2030.

10.0 Financial and Resource implications

10.1 There are no financial implications directly associated with this report, however implementing the Climate Change Strategy and the actions from the Carbon Management Programme will require extra financial resources that will be considered at budget in February 2023.

10.2 The actions and projects needed to reduce emissions and adapt to climate change cannot be made only by the Environmental Sustainability Team. The work needs to be integrated into the work of all staff, commitment is needed from all council departments, and will be steered through the cross-organisational Carbon Management Team and the strategic group.

11.0 Risk Assessment / Pentana

11.1 There are numerous risks relating to climate change that could stop the council from achieving its climate change goals, including:

- The buy-in of staff, understanding how their role relates to reducing emissions and adapting to climate change, understanding how to take action and their capacity to complete the work,
- Financing the numerous projects required, and the
- Public disagreeing with the action taken.

11.2 Climate change risks will be identified in November 2022 at a workshop co-designed with the council's Risk Management Officer, and will involve key officers from across the council. The risks will be managed using the existing risk system on Pentana and monitored quarterly as per the council's Risk Management Policy.

12.0 Health and Wellbeing Implications

12.1 There are no direct health and wellbeing implications from this report, the projects identified will co-benefit health and wellbeing.

12.2 Tackling climate change and enabling a low carbon future has many links to health and well-being. The impacts of climate change include warming temperatures and increases in the frequency or intensity of extreme weather events such as heat waves, cold spells, storms, flooding and access to food and services. Such events can threaten our health (especially for the most vulnerable), the food we eat, the water we drink and the air we breathe.

Background Documents

Appendix 1: Priorities for 2023/24

Appendix 2: Carbon Management Embedding Matrix

Appendix 1: Priorities for 2023/24

Action	Milestone Progress and End Dates	Allocated To	Anticipated Outcome	Strategy Priority (P) and Anticipated Greener West Lancashire Links ¹
Carbon pathways and footprint for 2021/2 and 2022/3.	<ul style="list-style-type: none"> Review the carbon footprint based on the data available. April 2023. Calculate the council's carbon footprint for 2021/2 and 2022/3. Summer 2023 Develop carbon pathway scenarios with interim targets to 2030 for the council's and borough's footprint. Autumn 2023 	<ul style="list-style-type: none"> ES Team ES Team Consultant 	<ul style="list-style-type: none"> Understand Business as Usual and pathway reduction scenarios. Understand the challenge to meet the targets. Measure progress. 	P1: Carbon Neutral Council G1
Instigate a	<ul style="list-style-type: none"> Monthly operational meetings. On- 	<ul style="list-style-type: none"> Operational Carbon 	<ul style="list-style-type: none"> New action plan. 	P1: Carbon Neutral Council

¹ Become a Greener West Lancashire, We Will...

G1: Be a role model and lead good practice; develop a Climate Change Strategy and action plan.

G2: Ensure all council buildings are operating to highest efficiency standards - insulation, design, and technology.

G3: Encourage local businesses and service providers to set their own targets for becoming carbon neutral and promote their achievements.

G4: Commit to maximising Council energy requirements from renewable sources.

G5: Maximise the use of solar panels on Council owned buildings and housing stock.

G6: Increase the use of environmentally friendly products.

G7: Optimise the development of solar/wind farm investment.

G8: Use the supply chain to maximise energy efficiency, design out waste and reduce our carbon footprint

G9: Optimise the Council fleet; increase route efficiency and maximise low emissions.

G10: Enhance green spaces promoting diverse leisure uses and explore the option of developing an Eco park.

G11: Support the development of green transport.

G12: Use green credentials to form part of our procurement selection criteria.

G13: Reduce waste and improve recycling, implement a Waste strategy with a focus on sustainable solutions.

G14: Develop a local plan policy encouraging green developments, green space, energy efficiency, sustainable supply chains.

Action	Milestone Progress and End Dates	Allocated To	Anticipated Outcome	Strategy Priority (P) and Anticipated Greener West Lancashire Links ¹
Carbon Management Programme for: 1. council operations	<ul style="list-style-type: none"> going. • Identify current and potential projects and simple prioritisation. Jan 2023 and on-going. • Quantify the potential CO₂e savings of projects. Spring 2023 and on-going. • Prioritise projects. Spring 2023 and on-going. • Gap analysis. Summer 2023 and on-going. • Start to action. 2023 	<ul style="list-style-type: none"> Management Team • As above • As above • As above • ES Team • Operational Carbon Management Team 	<ul style="list-style-type: none"> • Deliver projects. • Funding bids. 	P2: Sustainable Procurement P3: Travel and Transport P4: Domestic Sector P5: Commercial Sector P7: Natural Environment G1, G2, G4, G5, G7, G8, G9, G11
2. the borough	<ul style="list-style-type: none"> • As part of the monthly operational meetings (above), identify current and potential projects. Jan 2023 • Where possible prioritise and quantify the potential CO₂e savings of projects. Jan 2023 and on-going. • Prioritise projects. Spring 2023 and on-going. • Gap analysis. Summer 2023 and on-going. • Start to action. 2023. 	<ul style="list-style-type: none"> • Carbon Management Team • As above • As above • ES Team • Operational Carbon Management Team 	<ul style="list-style-type: none"> • New action plan. • Deliver projects. • Funding bids. 	P2: Sustainable Procurement P3: Travel and Transport P4: Domestic Sector P5: Commercial Sector P6: Community Action P7: Natural Environment G1, G3, G11, G14
Embedding carbon management into	<ul style="list-style-type: none"> • Review council activity against the Carbon Management Embedding Matrix: Identify the current status 	<ul style="list-style-type: none"> • Carbon Management Team (embedding) 	<ul style="list-style-type: none"> • New action plan. • Embedding carbon 	P1: Delivering a Carbon Neutral Council P2: Sustainable

Action	Milestone Progress and End Dates	Allocated To	Anticipated Outcome	Strategy Priority (P) and Anticipated Greener West Lancashire Links ¹
the council	and targets against the 7 action areas. Jan 2023. <ul style="list-style-type: none"> • Develop an action plan. Jan 2023. • Start to action. Feb 2023 and on-going. 	<ul style="list-style-type: none"> • As above • As above. 	management into the organisation.	Procurement G1, G2, G3, G6, G8, G12, G13, G14
Climate Risk and Adaptation	<ul style="list-style-type: none"> • Identify the risks to the council and borough from climate change. Nov 2022 • Risks and controls to mitigate risks added to Pentana. Jan 2023 • Monitored quarterly. On-going. 	<ul style="list-style-type: none"> • ES Team, Risk Management Officer and key officers across the council • Risk owner • Risk owner 	<ul style="list-style-type: none"> • Embedding climate risk into the organisation. 	P1: Carbon Neutral Council P2: Sustainable Procurement P3: Travel and Transport P4: Domestic Sector P5: Commercial Sector P6: Community Action P7: Natural Environment G1, G2, G10, G14

Appendix 2: Carbon Management Embedding Matrix

	CORPORATE STRATEGY	PROGRAMME MANAGEMENT	RESPONSIBILITY	DATA MANAGEMENT	COMMUNICATION & TRAINING	FINANCE & INVESTMENT	POLICY ALIGNMENT *
<p>Mature</p> <p>5</p>	<ul style="list-style-type: none"> Top level target allocated across organisation CO₂ reduction targets in Directorate Business Plans Action plans in place to embed strategy. Progress routinely reviewed 	<ul style="list-style-type: none"> Cabinet / SMT review progress against targets on quarterly basis Regular diagnostic reports provided to Directorates Progress against target published externally 	<ul style="list-style-type: none"> CM integrated in responsibilities of senior managers CM part of all contracts / Ts & Cs Central CO₂ reduction advice available Green Champions leading local action groups 	<ul style="list-style-type: none"> Regular collation of CO₂ emissions for all sources Data externally verified Monitoring & Targeting in place for: <ul style="list-style-type: none"> buildings street lighting transport/travel 	<ul style="list-style-type: none"> All staff given formalised CO₂: <ul style="list-style-type: none"> induction and training communications Joint CM communications with key partners Staff awareness tested through surveys 	<ul style="list-style-type: none"> Finance committed for 2+yrs of Programme External funding being routinely obtained Ring-fenced fund for carbon reduction initiatives 	<ul style="list-style-type: none"> CO₂ friendly operating procedure in place Central team provide advice and review, when requested Barriers to CO₂ reduction routinely considered and removed
4	<ul style="list-style-type: none"> CO₂ reduction commitment in Corporate Strategy Top level targets set for CO₂ reduction Climate Change Strategy reviewed annually 	<ul style="list-style-type: none"> Sponsor reviews progress and removes blockages through regular Programme Boards Progress against targets routinely reported to Senior Mgt Team 	<ul style="list-style-type: none"> CM integrated in to responsibilities of department heads Cabinet / SMT regularly updated Staff engaged though Green Champion network 	<ul style="list-style-type: none"> Annual collation of CO₂ emissions for: <ul style="list-style-type: none"> buildings street lighting transport/travel Data internally reviewed 	<ul style="list-style-type: none"> All staff given CO₂ reduction: <ul style="list-style-type: none"> induction communications CM matters – communicated to external community 	<ul style="list-style-type: none"> Co-ordinated financing for CO₂ reduction projects via Programme Board Funding principles and processes agreed Finances committed 1year ahead Some external financing 	<ul style="list-style-type: none"> Comprehensive review of policies complete Lower level policies reviewed locally Unpopular changes being considered
3	<ul style="list-style-type: none"> Vision for CO₂ reduction clearly stated and published Climate Change Strategy endorsed by Cabinet and publicised with staff 	<ul style="list-style-type: none"> Core team regularly review CM progress: <ul style="list-style-type: none"> actions profile & targets new opportunities 	<ul style="list-style-type: none"> An individual provides full time focus for CO₂ reduction Key individuals have accountability for carbon reduction Senior Sponsor actively engaged 	<ul style="list-style-type: none"> Collation of CO₂ emissions for limited scope i.e. buildings only 	<ul style="list-style-type: none"> Environmental / energy group(s) given ad hoc: <ul style="list-style-type: none"> training communications 	<ul style="list-style-type: none"> A view of the cost of CO₂ reduction is developing, but finance remains ad-hoc Some centralised resource allocated Finance representation on CM Team 	<ul style="list-style-type: none"> All high level and some mid level policies reviewed, irregularly Substantial changes made, showing CO₂ savings
2	<ul style="list-style-type: none"> Draft Climate Change Policy Climate Change references in other strategies 	<ul style="list-style-type: none"> Ad hoc reviews of CM actions progress 	<ul style="list-style-type: none"> CO₂ reduction a part-time responsibility of a few department champions 	<ul style="list-style-type: none"> No CO₂ emissions data compiled Energy data compiled on a regular basis 	<ul style="list-style-type: none"> Regular awareness campaigns Staff given CM information on ad-hoc basis 	<ul style="list-style-type: none"> Ad hoc financing for CO₂ reduction projects 	<ul style="list-style-type: none"> Partial review of key, high level policies Some financial quick wins made
<p>1</p> <p>Start</p>	<ul style="list-style-type: none"> No policy No Climate Change reference 	<ul style="list-style-type: none"> No CM monitoring 	<ul style="list-style-type: none"> No recognised CO₂ reduction responsibility 	<ul style="list-style-type: none"> No CO₂ emissions data compiled Estimated billing 	<ul style="list-style-type: none"> No communication or training 	<ul style="list-style-type: none"> No specific funding for CO₂ reduction projects 	<ul style="list-style-type: none"> No alignment of policies for CO₂ reduction



**SUBJECT: ADDENDUM TO CLIMATE CHANGE STRATEGY AND ACTION PLAN
2030: PROGRESS UPDATE, ACHIEVEMENTS AND 2023/24
PRIORITIES**

This addendum provides updates to specific parts of the reports content.

1. Note the text highlighted should read (i. 1):

6.1 In 2023/24, the priorities will be:

- i. Instigate an identification and mobilisation programme for:
 - 1) council operations
 - 2) the borough
- ii. Carbon pathways and footprint for 2021/2 and 2022/3
- iii. Carbon Management Embedding Matrix
- iv. Climate Risk and Adaptation

The focus will primarily be to develop (ii. 1) a project list of CO₂e saving opportunities for the council's operations, quantify where possible and start to implement the projects.

2. Since the report was written in early-November 2022, the Climate Change Risk Workshop took place, and Council are asked to note the following update:

11.2 The first Climate Change Risk workshop took place in late November 2022 and was well received. A further workshop will take place in 2023 to engage additional staff.



**CORPORATE AND ENVIRONMENTAL
OVERVIEW &
SCRUTINY COMMITTEE: 8
DECEMBER 2022**

CABINET: 24 JANUARY 2023

Joint report of: Corporate Director of Place & Community and Legal & Democratic Services Manager

Relevant Portfolio Holders: Councillors J Wilkie, C Coughlan & V Cummins

Contact for further information: Gillian Wossick, (Ext. 3424)

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**SUBJECT: RECOMENDATIONS FROM COMMUNITY ENVIRONMENTAL
IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS, TASK &
FINISH GROUP**

Wards affected: Skelmersdale, Burscough and Ormskirk

1.0 PURPOSE OF THE REPORT

1.1 To note the minutes of the Community Environmental Improvements, including Community Orchards, Task and Finish Group Meetings held 18 October 2022 (at Appendix 1) and minutes of meeting held 17 November 2022 (at Appendix 2), and to highlight areas recommended by Task & Finish Group for development of Community Orchards, and seek approval for Community Consultation around the areas identified, and approval for work to commence at sites which achieve 50%+ positive feedback from consultation.

2.0 RECOMMENDATIONS TO CORPORATE AND ENVIRONMENTAL OVERVIEW & SCRUTINY COMMITTEE

2.1 That the following minutes of the Community Environmental Improvements, Including Community Orchards, Task and Finish Group Meetings be noted:

- I. 18 October 2022 (Appendix 1)
- II. 17 November 2022 (Appendix 2)

- 2.2 That the areas recommended by the Task & Finish Group, for potential development of Community Orchards, set out in paragraph 5.1 of the report, be endorsed.
- 2.3 That approval from Cabinet be sought to carry out a Community Consultation around the shortlisted areas identified.
- 2.4 That approval from Cabinet be sought to give Delegate Powers to the Corporate Director of Place & Community, to commence work on those proposed Community Orchard Sites, that receive a 50%+ positive feedback from consultation to enable Planting to commence within the appropriate season.
- 2.5 That the principal of installing Information Boards at each of the Community Orchard sites, subject to budget provision, be endorsed.

3.0 RECOMMENDATIONS TO CABINET

- 3.1 That the recommendations from Community Environmental Improvements, including Community Orchards, Task and Finish Group to Corporate and Environmental Overview & Scrutiny Committee, in relation to the potential development of Community Orchards at the sites detailed at paragraph 5.1 of the report, be approved.
- 3.2 That a 2 week consultation be undertaken within the areas of those sites identified as potential Community Orchards.
- 3.3 That delegated authority be given to the Corporate Director of Place & Community, to commence work on those proposed Community Orchard Sites that receive a 50%+ positive feedback following consultation, to enable Planting to commence within the appropriate season.
- 3.4 That the principal of installing Information Boards at each of the Community Orchard sites, subject to budget provision, be approved.

4.0 BACKGROUND

- 4.1 In November 2020, West Lancashire Borough Council (the Council) adopted a new 'Climate Change Strategy and Action Plan 2030' (Strategy) to assist in the delivery of the Council's aspiration to be carbon neutral by 2030 at the latest, to be committed to climate action in other areas and to progress towards a low carbon West Lancashire.
- 4.2 The Strategy identified seven key priority areas for action, they are:
 - 1. Delivering a carbon neutral Council,
 - 2. Sustainable procurement,
 - 3. Transport and travel,
 - 4. Residential buildings,
 - 5. Commercial activity,
 - 6. Community action and the
 - 7. Natural environment.

The Community Orchards Project will directly assist the council to implement Priority 7: Natural Environment, and action: Protect and Promote Green Infrastructure.

5.0 CURRENT POSITION

5.1 Councillors were invited to propose locations in the borough for community orchards. 11 sites were visited to assess their suitability, with the following sites short-listed:

1. The Community Garden in Elswick, Tanhouse, Skelmersdale.
2. Pocket greenspace in Tanhouse, Skelmersdale.
3. Kiln Lane playing fields in Greenhill, Skelmersdale.
4. Manor Road Estate play park and pocket greenspace, Burscough.
5. Thompson Avenue field, Ormskirk.
6. Pocket greenspace on Brookhouse Road and Cotton Drive, Ormskirk.

6.0 ISSUES

6.1 Some of the sites may have services under the ground which will need investigating prior to any planting. Investigations will run concurrently with the community consultation to ensure the planting window is not missed prior to March 2023.

6.2 The Task and Finish Group felt it important that in order to be informative, inclusive and educational for the Community, Information Boards should be installed at each Community Orchard, explaining what the sites are, who they are for, what has been planted, identify edible fruits, when they are ripe and can be harvested, and how the community can get involved. Further budget provision may be required, and if additional funding is required, this will be subject to a further report.

7.0 CONSULTATION

7.1 The Task and Finish Group wishes to consult with the households in the immediate vicinity to the shortlisted sites. The consultation will seek to understand any potential issues relating to siting the orchards in those locations and if any residents wish to be involved in the project.

8.0 SUSTAINABILITY IMPLICATIONS

8.1 This project will have a positive impact on the local areas. They will help to mitigate climate change, will improve local air quality, provide a wildlife habitat and will help struggling pollinators.

9.0 FINANCIAL AND RESOURCE IMPLICATIONS

9.1 A budget of £6000 for Community Environmental Improvements, including Community Orchards is available to take forward this project, which could be used to fund the purchasing and planting of trees, and to investigate if services are underground at any of the proposed sites.

- 9.2 A costing exercise will need to be carried out for appropriate information signage boards and installation at each of the Community Orchard Sites, and if additional funding is required a report will be brought back to Cabinet/Council as appropriate.

10.0 RISK ASSESSMENT

- 10.1 The actions referred to in this report are covered by the scheme of delegation to officers and any necessary changes have been made in the relevant risk registers.

11.0 HEALTH AND WELLBEING IMPLICATIONS

- 11.1 Tackling climate change and enabling a low carbon future has many links to health and well-being. The impacts of climate change include warming temperatures and increases in the frequency or intensity of extreme weather events such as heat waves, cold spells, storms and flooding. Such events can threaten our health (especially for the most vulnerable), the food we eat, the water we drink and the air we breathe.
- 11.2 Planting fruit trees in these communities will help to improve the health of the residents through the availability of free fresh fruit, providing shade during hot weather and improving green spaces that help to lower stress.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

There is a direct impact on members of the public, employees, elected members and / or stakeholders, therefore an Equality Impact Assessment is required. A formal equality impact assessment is attached as an Appendix to this report. The results of the report and consultation results will be taken into consideration when planning the project.

Appendices

1. Minutes of Community Environmental Improvements, Including Community Orchards, Task & Finish Group meeting, held 18 October 2022.
2. Minutes of Community Environmental Improvements, Including Community Orchards, Task & Finish Group meeting, held 17 November 2022.
3. Equality Impact Assessment
4. Minute of Corporate & Environmental Overview & Scrutiny Committee – 8 December 2022 (Cabinet only)

TASK & FINISH GROUP - COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

HELD: Tuesday, 18 October 2022

Start: 5.05 pm

Finish: 6.29 pm

PRESENT:

Councillor: R Molloy (Chairman)
K Mitchell (Vice Chair)

Officers: Gillian Wossick, Environmental Services
Dan Massey, Outdoor Recreation Manager
Helen Peek, Member Services Officer

1 APPOINTMENT OF CHAIRMAN

AGREED: That Councillor Rob Molloy be appointed Chairman of the Task and Finish Group, and take control of the meeting.

2 APPOINTMENT OF VICE-CHAIRMAN

AGREED: That Councillor Kate Mitchell be appointed Vice Chairman of the Task and Finish Group

3 MEMBERSHIP OF TASK AND FINISH GROUP

Members considered if they wished to appoint any additional Members to the group, and if Substitute Members would be considered for appointment at future meetings. Should an appointed member not be able to attend.

AGREED:

A. That no additional Members were required at this time.

B. That Substitute Members would not be required.

C. That Members appointed to this group should be encouraged to attend future meetings.

4 APOLOGIES

Apologies for Absence were noted from Councillors: Mark Anderson, Katie Jukes, Janice Monaghan, and Marilyn Westley,

5 DECLARATIONS OF INTEREST

There were no Declarations of Interest received.

6 TERMS OF REFERENCE

TASK & FINISH GROUP - COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

HELD: Tuesday, 18 October 2022

AGREED: That the Terms of Reference set out in the Draft Project Plan for Community Environmental Improvements, Including Community Orchards, Task and Finish Group, be approved.

7 DRAFT PROJECT PLAN: COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

AGREED: That the Draft Project Plan for Community Environmental Improvements, Including Grot Spots, Task and Finish Group, be approved.

8 INTRODUCTION

The Outdoor Recreation Manager and The Environmental Sustainability Manager were introduced and invited to commence their presentation to Members

9 COMMUNITY ORCHARDS PLANTING - PRESENTATION

Members received a presentation by both the Outdoor Recreation Manager, and the Environmental Sustainability Manager, outlining:

- The benefits of planting community orchards, against the varying landscapes and other types of planting.
- How Community Orchards would link into the Councils Climate Change Strategy:
 - Sustainable Procurement
 - Reducing Greenhouse Gas Emissions from Transport and Travel
 - Reduce Greenhouse Gas Emissions from Residential Sector
 - Community Action
 - Natural Environment
- Co Benefits of the Project
 - Reduced Emissions
 - Improved Natural Environment
 - Improved Health and Well-being
 - Improved Air Quality;
- A list of potential sites put forward by Members of the Council, for consideration as potential Community Orchard Sites Pickles Drive Burscough.
 - West End Primary School, Ormskirk.
 - The community garden, in Elswick, Tanhouse

TASK & FINISH GROUP - COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

HELD: Tuesday, 18 October 2022

- ‘Various other pockets of greenspace in Tanhouse’.
 - Verges along Railway Road, at rear of Pennylands.
 - Kiln Lane playing fields/Greenhill.
 - Scarisbrick, opposite Pool Hey Lane.
 - Victoria Road Park, off Swanpool Lane, Augthon.
 - Land to Rear of Ashurst Community Centre
 - Cotton Drive near to Tennyson Drive
 - Brookhouse Road off Halsall Lane
 - The Manor Road estate, Burscough
 - Colliers row (Rainford bypass)
 - Westhead Village Hall
 - Nursery Avenue, Ormskirk
- Considerations relating to land makeup and usage, types of trees

AGREED: That Members noted the presentation.

10 FORWARD PLAN / NEXT STEPS

Following Consideration of Agenda Items 6 to 9 Members

AGREED: the next steps and instructed Officers as follows:

- A. Of the following potential sites put forward by Members of the Council for consideration, at Agenda Item 9, the Environmental Sustainability Manager, and the Outdoor Regeneration Manager are instructed to score the sites against the following criteria:
 - i. Deliverability
 - ii. Longevity
 - iii. Suitability of native species
 - iv. Proximity to Community

- B. The Environmental Sustainability Manager, and the Outdoor Regeneration Manager are to report their findings to Members at the next Task and Finish Group meeting, with a short list of recommended sites suitable for establishing Community Orchards, with a view to agree up to four sites

11 DATE OF NEXT MEETING

AGREED: The date of the next meeting be held 17 November 2022, at 17:30hrs, Via TEAMS.

TASK & FINISH GROUP - COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

HELD: Thursday, 17 November 2022

Start: 5.30 pm

Finish: 6.45 pm

PRESENT:

Councillor: R Molloy (Chairman)

Councillors: K Mitchell (Vice Chair)

In attendance:

Officers: Gillian Wossick, Environmental Services
Dan Massey, Outdoor Recreation Manager
Helen Peek, Democratic Services Officer

12 APOLOGIES

Apologies for Absence were noted from Councillors: Mark Anderson, Katie Jukes, Janice Monaghan and Marilyn Westley.

13 DECLARATIONS OF INTEREST

There were no Declarations of Interest received.

14 MINUTES OF PREVIOUS MEETING

AGREED: That the Minutes of the meeting held on 18 October 2022 be received as a correct record.

15 PROJECT PLAN REVIEW: COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

AGREED: That the updated Project Plan for Community Environmental Improvements, Including Community Orchards, Task and Finish Group, be noted.

16 COMMUNITY ORCHARDS SITE OPTIONS - PRESENTATION

Members received a presentation by both the Environmental Sustainability Manager, and the Outdoor Recreation Manager, outlining:

- The work carried out following the initial meeting of the Task & Finish Group.
- Sites visited:
 - The community garden, in Elswick, Tanhouse
 - 'Various other pockets of greenspace in Tanhouse'.
 - Verges along Railway Road, at rear of Pennylands.
 - Kiln Lane playing fields/Greenhill.
 - Victoria Road Park, off Swanpool Lane, Augthon.

TASK & FINISH GROUP - COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

HELD: Thursday, 17 November 2022

- Land to Rear of Ashurst Community Centre
- Cotton Drive near to Tennyson Drive
- Brookhouse Road off Halsall Lane
- The Manor Road estate, Burscough
- Nursery Avenue, Ormskirk

- Sites not visited, and rational around each site:
 - West End Primary School, Ormskirk
 - Colliers row (Rainford bypass)
 - Westhead Village Hall
 - Scarisbrick, opposite Pool Hey Lane.

- Additional site identified:
 - Thompson Avenue Field, Ormskirk.

- Results of the Sites scored against criteria agreed at previous meeting, with mapped locations of identified sites across the borough.

AGREED:

- A. That Members noted the detailed presentation, and thanked Officers for the clarity in its format.

- B. That Members were satisfied with the site visits which, and rational around those sites not visited.

- C. That Members were mindful of natures deadlines in order for Planting work to commence in the current year.

- D. That Members felt informed sufficiently to make recommendations to Corporate and Environmental Overview and Scrutiny Committee, to progress.

17 FORWARD PLAN / NEXT STEPS

It was noted that 8 December 2022 be the date of the next Corporate and Environmental Overview & Scrutiny Committee, and the 24 January be the date of the next Cabinet Meeting, where recommendations from this meeting are to be considered.

AGREED: Members agreed the next steps, and instructed Officers.

- A. That recommendations for the following potential sites be submitted to Corporate and Environmental Overview & Scrutiny Committee on 8th December for endorsement:
 - The Community Garden in Elswick, Tanhouse, Skelmersdale.

TASK & FINISH GROUP - COMMUNITY ENVIRONMENTAL IMPROVEMENTS, INCLUDING COMMUNITY ORCHARDS

HELD: Thursday, 17 November 2022

- Pocket greenspace in Tanhouse, Skelmersdale.
- Kiln Lane playing fields in Greenhill, Skelmersdale.
- Manor Road Estate play park and pocket greenspace, Burscough.
- Thompson Avenue field, Ormskirk.
- Pocket greenspace on Brookhouse Road and Cotton Drive, Ormskirk.

- B. That Recommendation be sought from Corporate and Environmental Overview & Scrutiny Committee, to Cabinet 24 January 2023, to approve a period of Community Consultation in the areas surrounding the potential sites identified.
- C. That Corporate Environmental Overview and Scrutiny Committee agree and seek approval, from Cabinet 24 January 2023, to Delegate Powers to Task & Finish Group Lead Officers, to commence work on those proposed Community Orchard Sites with a 50%+ positive feedback from consultation, in order to commence planting work within the short planting season.
- D. That Corporate Environmental Overview and Scrutiny Committee note and agree, in principal, to Information Boards being installed at each of the Community Orchard sites, and for a costings exercise be undertaken to bring back to Council for budget approval.
- E. That a Task and Finish update meeting be arranged early February 2023.

18 DATE OF NEXT MEETING

AGREED: The date of the next meeting be held 02 February 2023, at 17:30hrs, Via TEAMS.

1.

Equality Impact Assessment Form

Directorate: Place and Community	Service: Environmental and Leisure Services
Completed by: Gillian Wossick and Dan Massey	Date: 21/11/22
Subject Title: Community Orchards	
1. DESCRIPTION	
Is a policy or strategy being produced or revised:	No <i>*delete as appropriate</i>
Is a service being designed, redesigned or cutback:	No
Is a commissioning plan or contract specification being developed:	Yes
Is a budget being set or funding allocated:	Yes
Is a programme or project being planned:	Yes
Are recommendations being presented to senior managers and/or Councillors:	Yes
Does the activity contribute to meeting our duties under the Equality Act 2010 and Public Sector Equality Duty (Eliminating unlawful discrimination/harassment, advancing equality of opportunity, fostering good relations):	Yes
Details of the matter under consideration:	See the Community Orchards Report and Appendices.
<i>If you answered Yes to any of the above go straight to Section 3</i> <i>If you answered No to all the above please complete Section 2</i>	
2. RELEVANCE	
Does the work being carried out impact on service users, staff or Councillors (stakeholders):	Yes/No* <i>*delete as appropriate</i>
If Yes , provide details of how this impacts on service users, staff or Councillors (stakeholders): <i>If you answered Yes go to Section 3</i>	
If you answered No to both Sections 1 and 2 provide details of why there is no impact on these three groups: <i>You do not need to complete the rest of this form.</i>	
3. EVIDENCE COLLECTION	
Who does the work being carried out impact on, i.e. who is/are the stakeholder(s)?	Fruit trees will be planted on land in deprived communities and will be available to those communities for free.
If the work being carried out relates to a universal service, who needs or uses it most? (Is there any particular group affected more	6 locations have been identified in Skelmersdale, Burscough and Ormskirk for the orchards, based on where the council

than others)?	has land and its suitability for planting.
Which of the protected characteristics are most relevant to the work being carried out?	<i>*delete as appropriate</i>
Age	Yes
Gender	Yes
Disability	Yes – some sites
Race and Culture	Yes
Sexual Orientation	Yes
Religion or Belief	Yes
Gender Reassignment	Yes
Marriage and Civil Partnership	No
Pregnancy and Maternity	No
4. DATA ANALYSIS	
In relation to the work being carried out, and the service/function in question, who is actually or currently using the service and why?	This is a new service.
What will the impact of the work being carried out be on usage/the stakeholders?	Residents in these areas will be able to pick fresh fruit for free to supplement their diet.
What are people's views about the services? Are some customers more satisfied than others, and if so what are the reasons? Can these be affected by the proposals?	This is a new service.
What sources of data including consultation results have you used to analyse the impact of the work being carried out on users/stakeholders with protected characteristics?	See below.
If any further data/consultation is needed and is to be gathered, please specify:	Following approval from cabinet, the homes surrounding the short-listed sites will be consulted if they wish to have the orchard, to identify any issues they may face and if they wish to take part.
5. IMPACT OF DECISIONS	
In what way will the changes impact on people with particular protected characteristics (either positively or negatively or in terms of disproportionate impact)?	Not all sites have a path in the area of the proposed orchards. This will impact both disabled and users relating to age. Some trees will be maintained to grow low so disabled users can pick fruit. Where there is a path, the trees will be placed slightly away from the path to keep the line of sight, as this is a concern for vulnerable users.
6. CONSIDERING THE IMPACT	
If there is a negative impact what action can be taken to mitigate it? (If it is not possible or desirable to take actions to reduce the impact, explain why this is the case (e.g. legislative or financial drivers etc.).	See 5.
What actions do you plan to take to address	The budget does not allow for footpaths to

any other issues above?	be added to the sites. <i>If no actions are planned state no actions</i>
7. MONITORING AND REVIEWING	
When will this assessment be reviewed and who will review it?	The EIA will be reviewed mid-February 2023 following the community consultation.



**CORPORATE & ENVIRONMENTAL
OVERVIEW & SCRUTINY COMMITTEE:
8 DECEMBER 2022**

CABINET: 24 JANUARY 2023

Report of: Corporate Director of Housing, Transformation and Resources

Relevant Portfolio Holder: Councillor A Yates

**Contact for further information: Ms A Grimes (Extn. 3211)
(E-mail: alison.grimes@westlancs.gov.uk)**

SUBJECT: COUNCIL PERFORMANCE DELIVERY PLAN – Q2 2022/23

Wards affected: Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To present performance monitoring data for the quarter ended 30 September 2022.

2.0 RECOMMENDATIONS TO CORPORATE & ENVIRONMENTAL OVERVIEW & SCRUTINY COMMITTEE

2.1 That the Council's performance against the Council Plan for the quarter ended 30 September 2022 be noted and any agreed comments be forwarded to the Relevant Portfolio Holder and Corporate Director of Housing, Transformation and Resources for consideration.

3.0 RECOMMENDATIONS TO CABINET

3.1 That the Council's performance against the Council Plan for the quarter ended 30 September 2022 be noted.

3.2 That the call-in procedure is not appropriate for this item as the report was submitted to the meeting of the Corporate & Environmental Overview & Scrutiny Committee on 8 December 2022.

4.0 CURRENT POSITION

4.1 Members are referred to Appendix A of this report detailing the quarterly performance in delivery the Council Plan.

- 4.2 The Council Plan was agreed by Members in October 2020. No revisions were made to the Plan for 2022/23. The Plan provides clarity of purpose for the Council allowing efficient communication of its strategic direction with the public, stakeholders and staff. This in turn allows effective planning and prioritisation of work and supports transparency and accountability.
- 4.3 Services developed and timetabled the actions (the "We Will..." statements) to meet those priorities over the three years of the Council Plan. This covers a large amount of work over several years across a broad spectrum of services. The suite of indicators to support evidencing delivery during 2022/23 was agreed in March 2022.
- 4.4 Progress against the actions are summarised and provided in Appendix A along with quarterly reported KPIs, grouped by priority. Action progress is intended to provide information for those actions with activity of note, planned to conclude within the quarter or outstanding from previous quarters rather than an overview of all related work.
- 4.5 Delivery Plan at Appendix A refers to 44 items within the quarterly suite, 10 of which are 'data only' (no target). Of the 34 PIs with targets reported quarterly:

	Current Quarter	Previous Quarter*	Current vs previous Quarter*
Indicators meeting or exceeding target ('Green')	20	26	↓
Indicators narrowly missing target ('Amber')	7	4	↓
Indicators 5% or more off target ('Red')	7	4	↓
Data not yet available	0	0	—
Data that will not be provided (reason given in Appendix comments)	0	0	—

*not directly comparable as revised quarter suite. Covid Business Grants have now ceased and the KPI *WL148 Value of business support grants allocated and processed* (data only) will not be reported during the year unless grants are re-introduced.

- 4.6 Performance plans are prepared by service managers for those performance indicators where performance is below the target by 5% or more for this quarter. These plans (Appendix B) provide the narrative behind the outturn.

5.0 SUSTAINABILITY IMPACTS

- 5.1 The information set out in this report aims to help the Council achieve its priorities and vision and should contribute to the sustainability of services and the borough as a whole. There are no significant sustainability impacts associated with this report/update and, in particular, no significant impact on crime and disorder.

6.0 FINANCIAL AND RESOURCE IMPLICATIONS

6.1 There are no direct financial or resource implications arising from this report.

7.0 RISK ASSESSMENT

7.1 This item is for information only and makes no recommendations. It therefore does not require a formal risk assessment and no changes have been made to risk registers as a result of this report. Monitoring and managing performance information data helps the authority to ensure it is achieving its corporate priorities and key objectives and reduces the risk of not doing so.

8.0 HEALTH AND WELLBEING IMPLICATIONS

8.1 There are no health and wellbeing implications arising from this report. The Council Plan itself supports the improvement of health and wellbeing within West Lancashire.

Background Documents

There are no background documents (as defined in Section 100D(5) of the Local Government Act 1972) to this Report.

Equality Impact Assessment

The decision does not have any direct impact on members of the public, employees, elected members and / or stakeholders. Therefore no Equality Impact Assessment is required.

Appendices

Appendix A: Quarterly Corporate Performance Delivery Report
Appendix B: Performance Plans

CORPORATE PERFORMANCE DELIVERY

Quarter 2 (July-September) 2022/23



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Progress on the Council Plan is evidenced through specific actions and indicators delivered by service and cross-organisation strategic plans.

ACTION STATUS

- Completed
- In Progress
- Check Progress
- Overdue





INDICATOR STATUS

- OK (within 0.01%) or exceeded ...
- Warning (within 5%)
- Alert (by 5% or more)
- Data only (no target)
- Awaiting data





LEAD SERVICE

FPCPS: Finance, Procurement and Commercial Property; CCS: Corporate and Customer Services; HSGS: Housing Services ; ES: Environmental Services; PRS: Planning and Regulatory Services; WLP: Wellbeing and Place Services

Be a Financially Sustainable Council by 2023



Priority Actions			
We will...	Quarter delivery	Status	Lead
Maximise the value from existing assets and focus on value for money	Requires focus / attention: Rent reviews/lease renewals backlog created by Covid. The post-covid backlog is being reviewed to identify those where rent increases are justifiable in the current economic and market conditions		FPCPS
Review existing contract savings and work with suppliers to achieve economies of scale	Two Procurement Officers have been appointed. One internal appointment is in post and the external appointment due to start in November. Two Assistant Procurement Officers (both internal appointments) will be in post by the end of November. The move to managing procurement centrally will enable significant improvement and control over procurement activity. This will be a phased approach initially focusing on the areas that require most support whilst the Procurement team builds its resilience and capacity.		FPCPS
Make sure our internal financial and decision-making processes continue to be strong	The 21/22 unaudited accounts have now been published. We provided the 20/21 unaudited accounts v3 to auditors along with all the corresponding working papers. Member training on core aspects of the Council's financial processes is prepared for October with a session on treasury management.		FPCPS
Continuously develop, find better ways to do things and embrace new technology	Strengthening corporate planning, governance and security, the development of new intuitive M365 forms for Service Action Planning and HR Digital Movers were completed. The HR form enhances the movers process and reduces risk to data security. An upgrade to Civica payment system was completed to aid increased functionality and an upgrade to OPAYO secure payment platform was completed to reduce risk to the organisation.		CCS

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Be a financially sustainable Council by 2023 - KPIs										
Out of the 9 total KPIs within the priority, 7 are reported quarterly.										
Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
WL132-c19* FTE working days lost due to sickness absence per average FTE (COVID Inclusive)	11.20	3.20	2.52	3.34	2.65	2.19	2.02		Over the quarter performance improved with September figures meeting the target. Performance Plan attached at Appendix B1	
R1* % of Council Tax collected	92.73%	52.29%	79.08%	92.73%	26.94%	52.28%	57.31%		Performance Plan attached at Appendix B2	








Be a financially sustainable Council by 2023 - KPIs

Out of the 9 total KPIs within the priority, 7 are reported quarterly.

Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
TS1a* Rent collected from current and former tenants as a % of rent owed (excluding arrears b/f).	100.73	100.18	100.86	100.73	103.65	99.67	100	↓	We have collected £470,884 more at this point in the financial year than this time last year, but due to rent increases have not quite met target. The Income and Money Advice Team are ensuring support is available to tenants who need it. This includes help with the housing support fund, applications to reduce council tax debt, fuel and food support and help with essential items to reduce poverty.	⚠
TS11 * % of rent loss through dwellings being vacant	1.18%	1.38%	1.23%	1.18%	1.06%	1.14%	1.1%	↑		⚠
R3* % of Business Rates Collected (NNDR)	93.79%	42.50%	69.40%	93.79%	24.25%	57.42%	55.55%	↑		✅
E01* % rent loss through empty commercial properties available to rent	4.2	2.8	3.1	4.2	4.4	4.7	10	↓	Slight upward trend continues reflecting hardening economic outlook.	✅
L130* No. Service Now Customer Accounts	48,433	44,811	46,500	48,433	50,294	51,821		↑		




1001782

Become a Greener West Lancashire







We will...	Quarter delivery	Status	Lead
Be a role model and lead good practice; develop a Climate Change Strategy and action plan	The role of Climate Change Officer has been advertised. Work on the review of the action plan, development of risk and a Climate Management Programme has begun. A positive outcome from the review of the action plan is that it has identified new supporting actions that the council is actively working on. The review will be completed by the end of October 2022.		ES
Optimise the Council fleet; increase route efficiency and maximise low emissions	The action forms part of the Our Futures transformation programme. A new Project Manager is now in post and has begun scoping work on this with all involved services.		ES
Reduce waste and improve recycling, implement a Waste strategy with a focus on sustainable solutions	A project has been started with Overview & Scrutiny to progress dual recycling points across the borough and linking in with Parish councils. There are currently 17 recycling bins throughout the Borough. We are currently looking to increase this to 25 before the end of Q4.		ES
Support the development of green transport	More electric vehicle charging points are being installed across the Borough. This forms part of our plans to make the option of owning electric vehicles more accessible for residents who would be unable to charge electric vehicles on their own driveway. The grant award letter was signed in February 2022 and ground works started in September. Chargepoints are expected to be live before the end of March 2023. A task and finish group has been set up to review current fleet.		ES
Increase the use of environmentally friendly products	All caterers and traders at the Green Fayre committed to no single use plastics and recyclable packaging. This is now in place for all events and activities managed by Outdoor Recreation Service.		WLP
Use green credentials to form part of our procurement selection criteria Use the supply chain to maximise energy efficiency, design out waste and reduce our carbon footprint	The delay of the Government's reform paper (expected 2023) combined with capacity of the service has meant this work cannot yet be planned in detail or progressed and is unlikely to conclude during 2022/23.		FPCPS
Optimise the development of solar/wind farm investment	Homes England Contingent Asset Liability Team has commissioned a third party specialist consultant to ascertain the relevance and any value of clawback associated with the proposed solar farm site at White Moss.		FPCPS

Become a Greener West Lancashire - KPIs

Out of the 6 total KPIs within the priority, 3 are reported quarterly.

Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
ES01* No. grass cuts undertaken on the highway between April-October	8	7	8	8	3	7	7	▬		
ES02* No. grass cuts undertaken in Sheltered Accommodation between April-October	10	8	10	10	4	9	9	↑		
NI192* Percentage of kerbside household waste sent for reuse, recycling and composting	42.40%	47.80%	42.54%	39.50%	48.75%	46.25%	47.80%	↓	Reduction is expected to be due to more people back in the workplace and less recyclables being used in the property relative to grey waste	

Create empowered, engaged and inclusive communities








Priority Actions			
We will...	Quarter delivery	Status	Lead
Listen and provide feedback to customers about how their views have improved services	<p>The new Customer Feedback Policy which enables customers to make comments, compliments and complaints in relation to our services has been launched. As part of development we actively sought feedback from customers who had used the previous process to make a complaint and feedback on their experience was then used to shape the new policy.</p> <p>The new policy reduces the number of stages in our complaint process therefore speeding up the process and making it easier for customers to give feedback. The feedback is now triaged and monitored by a central team and the website updated to reflect the changes and to give further guidance to customers all to support improving the overall customer experience.</p> <p>Senior Managers received training around the new policy and also how to handle, investigate and respond to feedback effectively, as well as how to use this to make and evidence service improvements. This will also be shared with customers through our website. Customers are also invited to give their views on how we handled their feedback once they have gone through the process. This information will be used to enable services to learn and improve.</p>		CCS
Engage with communities when making key decisions Adopt a best practice model of consultation	<p>The Citizen and Stakeholder Survey, managed by appointed provider NWA, is complete and the results will be presented to the Executive Overview and Scrutiny Committee and Cabinet meetings in November.</p> <p>During the quarter we supported the Polling Review consultation and now have a total of 226 residents registered with the Your Voice Engagement Portal. The Tenant Portal also hosted the Housing Allocations Policy review with 75 submissions and Garage Allocations with 68 submissions. We have also finalised the procurement to undertake the Tenant Satisfaction Measures consultation which will be planned after the purdah period.</p>		CCS
Work with partners to develop a meaningful offer to support citizens to become digitally included	The <i>We Are Digital Programme</i> has completed with an underspend from the contract. It is using this to buy unused laptops/kit from the provider. This kit will be distributed through the Community Connector team who are well placed to identify community organisations and schemes well connected to residents who are digitally excluded due to financial reasons. Discussion on how to approach a more targeted approach to digital inclusion is planned between Engagement, Financial Inclusion, and the Wellbeing Teams.		CCS
Use Councillors' existing reach and influence to provide community feedback to shape decision making	The Political Governance Arrangements Working Group investigated options for change in the political system of governance for the Council. A report with the Committee's recommendation for the move to a Committee System in 2024 will be presented at full Council in October.		LDS
Develop neighbourhood plans with key partnerships committed to meeting the needs of our communities	Community and Wellbeing Manager has worked strategically to understand the possibilities and implications of mobilising a neighbourhood model.		WLP
Build on and develop strengths within local communities	<p>The Community Connector Team delivered a series of pop-up community consultation events:</p> <ul style="list-style-type: none"> initially concentrating on the four deprived wards of Skelmersdale. 183 residents and 42 Group Leaders completed consultation forms. Data collated and action plan being devised. 6 event facilitated & delivered at locations with high footfall including: Ormskirk Market, Tawd Valley Retail Park, Concourse Skelmersdale, Beacon Country Park, Tanhouse Community Hub with 157 residents engaging with our team. <p>Contact has been made with voluntary groups to collate contact details and areas of working groups with the aim of increasing voluntary involvement with Environmental Services. The Clean & Green Champions is running alongside task and finish group for fly tipping and grot spots. Arrangements have been made to produce a volunteer handbook and provide equipment to groups.</p>		WLP/ ES

Create empowered, engaged and inclusive communities - KPIs

Out of the 7 total KPIs within the priority, 5 are reported quarterly.

Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
WL90* % of Contact Centre calls answered	87.8%	89.5%	87.7%	87.3%	92.6%	93.2%	88.0%	↑		
WL108* Average answered waiting time for callers to the contact centre (seconds)	150	133	154	163	110	99	145	↑		
WL85a* Website: no. visits	540,099	79,765	157,060	198,295	230,130	195,685		↑	The significant increase on the same period in the previous year is mainly due to the energy rebate schemes. Most popular pages during quarter were pay a bill, search planning applications and £150 energy rebate.	
WL85c* Website: No. of payments processed online	72,380	15,365	15,860	13,171	22,711	14,416		↓	Figures for this quarter dip after Q1 however the main services for online payments continue to be Council Tax, Housing Rents and Garden Waste Subscriptions	
WL851* No. Social Media Followers (WLBC FB, Twitter)	14,870	14,205	14,489	14,870	15,145	15,391		↑	Most engaging posts include The Bank Holiday Festival, The death of Queen Elizabeth II, the proclamation and Green Fayre	

A clean safe environment with affordable homes to buy or rent for everyone in West Lancashire

Priority Actions			
We will...	Quarter delivery	Status	Lead
Develop homes to rent/buy/for shared ownership through Tawd Valley Development Company	<p>Northfield was a phased completion and handover with phases 1 and 2 completed (17 Homes). Phase 3 is due to complete week of 7 October 2022.</p> <p>Comments from internal colleagues on the Rent to Buy Policy and Shared Ownership Policy have been received and will be used to re-shape the policies accordingly. Legal have advised that Counsel advice is required so this aspect needs to be factored in to the policy development process ahead of eventual Member consideration.</p> <p>Requires focus/attention : Halton Castle (10 homes) was also due to complete in August, however a delay in legal agreements with Electricity North West apparatus could not be installed according to programme. The completion date has therefore moved to November 2022.</p>		TVD / HSG
Continue to drive forward the community safety agenda	<p>Requires focus / attention: Progress currently outside of service control. The Serious Violence Crime Duty has been delayed and is likely to be introduced in October/November 2022. The production/adoption of a Serious Violence Plan by the Community Strategy Partnership is therefore delayed.</p>		PRS
Develop environment ward reports for members	Ward Reports are to be renamed ' <i>Environmental Services Update</i> ' This will appear in the monthly Member Updates delivered by Digital Communications. The first service update will appear in November's edition.		ES
Deliver high quality street cleansing services based on demand	There has been some movement of Clean and Green team operatives to ensure equal skills within the teams for the winter season.		ES
Review our Housing Strategy Get the right mix of properties for each community	A report for Cabinet in November has been prepared to outline the link between HEDNA publication and housing strategy development. The report also seeks an extension to the operating period for the existing housing strategy to March 2024 and re-endorsement of the existing vision and delivery objectives as well as confirming progress is being made against delivery objectives in the meantime. The delay does not impact on operational delivery of housing related interventions, inward investment and day to day activity eg affordable housing and supported housing for vulnerable client groups.		HSG
Identify strategic regeneration areas and investment plans Increase the supply of homes to bring cheaper private rents/more choice	The responses to the Scope, Issues and Options consultation of the Local Plan which concluded in January 2022 are now being summarised and emerging themes are being collated.		PRS
Review WLBC/public estate land holdings	Proposals for re-establishing a SAMP process are to be reviewed.		FPCPS

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A clean safe environment with affordable homes to buy or rent for everyone in West Lancashire - KPIs

Out of the 22 total KPIs within the priority, 15 are reported quarterly.

Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
ES07* % locations inspected falling into categories C/D - Overflowing Litter Bins (cumulative) ¹	00.00%	00.00%	00.00%	N/A ²	00.00%	08.33%	05.00%	↓	Performance plan attached at Appendix B3	🛑
ES08* % locations inspected falling into categories A/B - grounds maintenance (includes grass and shrubbery) (cumulative) ¹	100.00%	100.00%	100.00%	N/A ²	100.00%	94.79%	95.00%	↓	Context for performance is given in the above plan	⚠️
ES11* % locations inspected falling into categories C/D - Detritus (cumulative) ¹	4.40%	02.20%	04.40%	N/A ²	16.44%	05.21%	05.00%	↓	As above	⚠️
ES04* % locations inspected falling into categories A/B - Litter (cumulative) ¹	100.00%	95.70%	100.00%	N/A ²	95.06%	99.14%	97.00%	↑		✅
ES06* % locations inspected falling into categories A/B - Dog Fouling (cumulative)	100.00%	100.00%	100.00%	N/A ²	100.00%	100.00%	97.00%	▬		✅
ES19a* % successful planned bin collections (grey)	99.2%	99.8%	98.9%	99.26%	99.8%	99.8%	97%	▬		✅
ES19b* % successful planned bin collections (blue)	99.89%	99.8%	99.82%	99.91%	99.92%	99.92%	97%	↑		✅
ES19c* % successful planned bin collections (brown)	97.94%	99.8%	99.68%	99.93%	99.63%	99.84%	97%	↑		✅
ES19d* % successful planned bin collections (green)	99.15%	99.7%	99.85%	99.91%	99.93%	99.94%	97%	↑		✅
HS27* % of properties with a valid Landlord Gas Safety Record (homes and buildings)	99.9%	99.9%	99.9%	99.9%	99.9%	99.9%	100.0%	▬	Outturn is consistent with an average of 1-10 properties with out of date certificates at different stages of the legal process. Within the quarter, two months were at 100%.	⚠️
HS28* % of properties with a valid Electrical Installation Condition Report (homes and buildings)	96.5%	98.1%	96.7%	96.5%	96.0%	96.3%	100.0%	↓	Outturn relates to 200+ properties currently past their reinspection date. Although there are currently no legislative requirements for inspecting electrical installations we operate a 5-year reinspection schedule on all Council managed properties. We consistently achieve above 90% of re-inspections within 5 years and operate a no access and escalation	⚠️

A clean safe environment with affordable homes to buy or rent for everyone in West Lancashire - KPIs






Out of the 22 total KPIs within the priority, 15 are reported quarterly.

Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
									procedure for properties where we have not been able to gain access.	
HS29* % non-domestic that require an asbestos management survey/re-inspection	100.0%	93.8%	N/A ³	100.0%	100.0%	100.0%	100.0%	↑		✓
HS30* % of non-domestic properties with fire risk assessment in place	100.0%	100.0%	N/A ³	100.0%	100.0%	100.0%	100.0%	▬		✓
HS31* % of properties covered by water hygiene risk assessment (homes and buildings)	100.0%	100.0%	N/A ³	100.0%	100.0%	100.0%	100.0%	▬		✓
WL161* Affordable Housing units via Tawd Valley Developments	44	13	29	2	0	17	17	↑	Outturn from Northfield phase 1 and 2 completions.	✓

¹ ES04, 06, 07, 08 and 11: annual outturn based on position at Q3 since Q4 inspection not carried out due to resource/capacity issues within the service. This was addressed for Q1 22/23;

² Insufficient area inspections were submitted to generate scoring through the Land Audit Management System quality inspection model; ³ Surveys and validation of data mean data for HS 29/30/31 in Q3 21/22 was not available.

Everyone to be healthy, happy, safe and resilient

Priority Actions			
We will...	Quarter delivery	Status	Lead
Deliver our people strategy with Council staff that results in a continuously improving culture	<p>A detailed review of the Recruitment, Induction and Probation policies and processes is currently being undertaken to support attraction and retention of skilled staff within the Council. Revised induction processes and a renewed emphasis on an effective probation process will be rolled out shortly. This work is aligned to the outcomes of the staff survey and peer review.</p> <p>Requires focus/attention : The increased cost-of-living is a national concern. The Council will focus on promoting support mechanisms for staff as well as Customers. The HR and OD Teams are currently consulting with managers to understand their priorities for HR and OD Services to ensure the work programme is fully aligned to the needs of the Council with a view to relaunching its People Strategy Ambassador Programme.</p>		CCS
Work with partners to focus on prevention and reducing health inequalities	<p>The LCC funding for the WLBC bid for CYP initiatives was repurposed and no longer available. A new Community Connector and Wellbeing post has been recruited to start in January 2023 to focus on CYP.</p> <p>As the District Family Hubs Network Lead, the Community & Wellbeing Manager will be working on Programme design and implementation from January 2023.</p> <p>The Team are actively promoting the opportunities for the third sector to engage with the Optimal Ageing pilot as and when appropriate. The pilot deadline for delivery has now passed, funding will be spent to enable and encourage social and physical activity for older adults in the community.</p> <p>The Wellbeing and Community Manager is working with external partners to codesign a concept that connects local services to ensure that residents who have multiple priorities can access the right service at the right time for them - Shared point of access model.</p>		WLP
Bring in additional money/services to support our most deprived areas	<p>An MPT staff member is now based within the Housing Team twice per week. This has encouraged referrals into MPT and raised awareness of the scheme and opportunities.</p> <p>Internal funding workshop was delivered to enhance the knowledge of the team and provide ability to support third sector organisations.</p> <p>UKSPF funding application has been submitted</p> <p>A new MOU is being written to draw across funds from the Integrated Care Board to recruit two new fixed term staff to deliver population health-based initiatives within the community.</p>		WLP
Facilitate and co-ordinate Food Insecurity Action Plan	The Food Insecurity forum has developed an action plan and partners are working to mobilise some of the priorities.		WLP
Deliver our health and wellbeing strategy embedding school initiatives	Health and Wellbeing within all policies and decisions. Clear understanding about the purpose of the strategy and what resources are available to codesign and produce a strategy or action plan that is reflective of the local place-based priorities and partner vision/strategies.		WLP

Priority Actions			
We will...	Quarter delivery	Status	Lead
Develop a quality range of health, wellbeing and leisure facilities and services	<p>WLBC Levelling Up Fund bid was submitted which totalled an ask of £13.1 million. Officers expect to hear the outcome of our application in December 2022.</p> <p>During Q2, the Access agreement for RIBA 3 and RIBA 4 has been sealed and pre construction surveys will commence early November with partner consultation scheduled to start early December. By the end of Stage 3 (April 2023), the architectural, building services and structural engineering designs will all have been developed and will have been checked by the lead designer and client team. The build cost will be aligned to the Project Budget during this phase.</p> <p>Burscough Wellbeing and Leisure hub is a refurbishment therefore this project will be on a standalone access agreement with ALS. This is scheduled to be received no later than 23rd Dec 2022 for Officer review.</p> <p>Beacon developments are progressing, a report has been shared with Leisure Committee members and recommendations have been made.</p>		WLP








Everyone to be healthy, happy, safe and resilient - KPIs										
Out of the 15 total KPIs within the priority, 12 are reported quarterly.										
Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
Page 791 WL159* No. attending parks and countryside events and activities	3,163	1,877	208	240	12,363	14,341	17,000		<p>When the events programme was compiled the number of summer events was reduced due to staff capacity (including for the extra planning/delivery of the Jubilee events in Q1). Green Fayre attendance was slightly lower than expected due to erratic weather and Motorfest figures for those using Coronation Park were expected to be included when the target was set.</p> <p>Head of Service decision Plan not required as would not improve performance.</p>	
WL151a* Number of new clients attending vocational training	202	24	126	33	41	19	24		<p>Outturn relates to MPT and Health Walk Leader Training Course. Team is a staff member down, and new management in place. Awaiting proof of course completion from a number of participants.</p> <p>Head of Service decision Plan not required as would not improve performance.</p>	
WL151b* Number of new participants engaged to enhance	327	94	118	37	41	25	70		<p>Team is a staff member down, and new management in place. Currently end of year</p>	

Everyone to be healthy, happy, safe and resilient - KPIs

Out of the 15 total KPIs within the priority, 12 are reported quarterly.




Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
employability, confidence, skills and qualifications									target is achievable based on currently recruitment. Head of Service decision Plan not required as would not improve performance.	
WL150* Number of new participants engaged in health & wellbeing programmes/interventions	333	58	130	116	559	283	70	↑		✔
WL153a* No. of partners working with Wellbeing and Leisure Service	72	78	87	72	38	42	40	↓		✔
WL157a* No. visits to leisure facilities	485,916	116,787	137,467	155,472	147,055	130,045	125,000	↑		✔
B5* Speed of Processing Housing Benefit	N/A PI not developed at this time				6	5	12	/		✔
PL165* % Staff Turnover Rate	N/A PI not developed at this time				5.04%	2.57%		/		
TS52* No. tenants accessing money advice service	2043	453	548	618	486	565		↑	Increase due to Income and Money Advice team proactively contacting tenants who have had an increase in heating charges with outstanding arrears.	
TS53* No. tenants supported with Food Poverty advice	304	78	66	104	89	117		↑	Increase indicative of the cost of living crisis. This is also due to the support offered through joint working with Money Advice and specific food bank providers.	
TS54* No. people provided with money advice to help prevent homelessness (tenants & residents)	36	4	8	11	1	15		↑	Increase for Q2 due to several of these referrals being received in Q1 but completed in Q2.	
TS55* No. tenants provided with fuel poverty advice	110	58	6	4	34	90		↑	Significant increase is indicative of the cost of living crisis and the support that is needed.	


Support businesses to adapt and prosper

Priority Actions			
We will...	Quarter delivery	Status	Lead
Adopt an inclusive procurement approach which supports local businesses to tender for opportunities	<p>The Procurement Manager has continued to work with Centre of Local Economic Strategies (CLES) and has developed standardised wording relating to social value for tenders which is beginning to be introduced as appropriate.</p> <p>Requires focus / attention: A Social Policy that reflects the Community Wealth Building initiative still under consideration/development. Due to conflicting priorities the work on the Procurement page on the Council website has been delayed.</p>		FPCPS
Develop a strong web presence which positively promotes West Lancashire	The action forms part of the Our Futures transformation programme. Key stakeholders have been identified within the project team for support. Scope is being finalised to include budget, benefits and milestones.		CCS
Support the recovery and growth of existing and new businesses	<p>The gift card scheme has recently been launched to strengthen the local/independent shopping offer across the borough. This has been promoted through both the Council's and Discover Ormskirk Channels.</p> <p>Awaiting timeframe for the Local Plan before the scope of the Economic Development Strategy can be determined.</p>		WLP/ CCS
Develop the market offer and reinvigorate Ormskirk's Eastern gateway	Develop the market offer activity previously completed. Ormskirk Eastern Gateway is progressing and forecast for completion by March 2023. A delay in works contract is due to the presence of nesting birds and contractor's performance.		WLP
Lead the regeneration of Skelmersdale Town Centre	LCC have issued the final draft legal documents for the monies from the Economic Recovery and Growth Fund for review by WLBC Legal Services.		WLP
Create enlivened town centres offering diverse leisure opportunities and night time economy	August Bank Holiday showed a successful multi-partner town centre event. Artisan markets are ongoing for the remainder of 2022. Christmas event planning is in progress.		WLP
Signpost and support businesses to innovate and diversify	Following the work associated with distributing COVID-related business grants, the Business Engagement Service focus is on helping local businesses continue to adapt from the impact from COVID. Different sectors experience different issues during recovery and the team is helping with queries including around start-ups, skills & training, finding commercial land and property, networking and funding and other opportunities. For example, as previously reported the team is currently supporting businesses become more environmentally sustainable and energy efficient and earn the internationally recognised Green Tourism Award.		CCS


Support businesses to adapt and prosper - KPIs


Out of the 7 total KPIs within the priority, 2 are reported quarterly.

Performance Indicator	2021/22	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Current Quarter Target	Outturn vs same Q previous year	Comment	Quarter Status
	Value	Value	Value	Value	Value	Value				
BV8* % invoices paid on time (within quarter)	93.21%	90.92%	93.12%	91.92%	94.12%	93.81%	98.75%	↑	Performance Plan attached at Appendix B4	
ER09* Number of businesses added value to via business support, property searches, skills and employment	925	27	254	628	15	11		↓	Reduction this year reflects the end of Covid Business Grants	


PERFORMANCE PLAN				
Indicator	WL132-c19 FTE working days lost due to sickness absence			
Quarter Target	2.02	Quarter outturn	2.19 (Q2)	
Reason(s) for not meeting target				
<p>The main reason for sickness absence continues to be Anxiety/Stress/Depression, both work and non-work related. This has remained the same for Quarter 1 and Quarter 2. In Quarter 2 there was higher number of absences related to Coronavirus.</p>				
Additional commentary / background				
<p>The Council continues to mitigate Covid absences as far as possible by ensuring that those staff who suffer from Covid can work from home where possible and are not recorded as sickness absences. The HR Team have been taking advice from the Local Government Association on how to manage absences related to the Coronavirus. However, in front-facing services, this is not possible. Staff have no alternative other than to self-isolate and report in sick, even if they have had a mild case and could have worked through this illness in different circumstances.</p> <p>The five main causes of sickness absence in the Quarter 2 period were:</p> <ol style="list-style-type: none"> 1. Anxiety/Stress (including work related and non-work related) 2. Coronavirus (COVID-19) 3. Gastrointestinal Problems (e.g., Abdominal Pain/Gastroenteritis/Vomiting/Diarrhoea) 4. Surgery/Post Operative Recuperation 5. Injury/Fracture <p>HR Business Partners (HRBPs) work closely with managers on absence and attendance management in line with the Management of Sickness Absence Policy. HRBPs also remind managers around the legal responsibilities under the Health and Safety Act 1974 regarding completing stress risk assessment and continue to reinforce the mental health and wellbeing support within the Council to all staff as this relates to the main cause of sickness absence. In addition, regular monthly sickness data is provided to Heads of Service so they can review with Line Managers and ensure appropriate actions are being taken.</p>				
Action plan				
Tasks to be undertaken				Completion due date
Participate in the National Stress Awareness Day 2022. Reinforcing the use of Mental Health First Aiders and reminding staff of the services from Able Futures who deliver free mental health support service as well as the Council partnership with Zurich Insurance, who provide impartial help and support to employees with their health and wellbeing, including free counselling and advice on stress-related issues such as finance, family matters, bereavement, addiction, anxiety, and self-esteem.				November 2022 (complete)
Review the Return-to-Work Form and highlight how to turn it into an E Form. This will ensure that sickness data is captured on one data sheet for the entire council to improve the reporting process. In August 2022 the form was sent to Business Transformation and the OD team will be attending a coaching session to begin to build the first version of the E Form.				November 2022
Discussed if there is a business need to implement an Andropause Policy and Management Guidance. Andropause is defined as changes in psychological or physical health in males, attributed to age-related hormonal changes, or lifestyle or psychological problems, negatively impacting on health. On average, andropause tends to occur in men over 50, however, this is not always the case. Psychological effects include depression and anxiety, which is one the five main causes for				November 2022

<p>sickness absence. With WLBC having an aging workforce then this policy could help manage the health and wellbeing of make employees over 50 years of age.</p> <p>The first draft of the policy has been completed, to support the Environmental Services Wellbeing Day, it will at this event HR and OD will gather further feedback to shape the final version of the policy.</p>	
<p>From October 2022 it was aimed that all new starters will be attending HR and OD Staff Briefings on the Attendance Management Policy and Wellbeing facilities. Due to annual leave absence this moved to November 2022. The OD staff will be holding their designated staff briefings in November. OD are now coordinating the dates.</p>	November 2022
<p>Staff raised the issues of lack of 121 meetings. HR and OD have drafted a 121 meeting notes template to ensure it captures the following:</p> <ul style="list-style-type: none"> • Key achievement • Achievement per quarter • Areas of struggle per quarter • How staff overcame any issues or problems • Key activities planned per quarter • How we sustain or improve health and well being • Personal development needs per quarter. • Risks on Pentana that are assigned to the employee is suitable and conformable <p>Lunch time learning session is being designed to brief line managers on how to make the most out of the 121 meeting and the importance of planning the workload each quarter. This will be launched in December 2022.</p>	December 2022
<p>Update team on how to manage long covid cases. In preparation for Q3 winter season, the team will be using the Unison Joint Covid Protocol, to facilitate a return to work for employees who, has been absent with long Covid. The HR Team is keeping up to date regarding Covid-19 employment law and workforce FAQs via the Local Government Association. COVID-19 employment law and workforce FAQs Local Government Association</p>	December 2022
<p>The following training and development courses will be made mandatory to support sickness performance, once the new Learning Management System is put in place:</p> <ul style="list-style-type: none"> • Stress Awareness for Managers: Within the first 3 months of management appointment, if internally promoted or as part of manager induction, if a recruit • Health and Safety First 6 months (induction and probation) and every 2 years. • Managing Remote Workers Within the first 3 months of management appointment, if internally promoted or as part of manager induction if a recruit. • Suicide Prevention Awareness Within the first 6 months of management appointment, if internally promoted or as part of manager induction, if a recruit 	March 2023
<p>Improvement expected:</p> <p>Improvements in performance may not be reflective until Q4</p>	
<p>Plan prepared by: HR and Project Specialist Manager</p>	

PERFORMANCE PLAN				
Indicator	R1 - % Council Tax collected (current year)			
Quarter Target	57.31%	Quarter outturn	52.28%	
<p>Reason(s) for not meeting target Performance impacted by Borough Council decision to suspend Statutory Recovery processes whilst delivering Energy Rebate Scheme</p>				
<p>Additional commentary / background Council Tax has been impacted as a result of the decision to cease statutory recovery since February 2022. This decision was made by Head of Service/Service Manager initially support the transition of customer calls from LCC Customer Access Service into WLBC Customer Service, however this was extended further following the government's announcement to deliver a £150 non-refundable payment to all properties within council tax bands A – D (circa 41,000)</p> <p>We have successfully administered the support packages announced by Government in terms of the Energy Rebate, Discretionary Energy Rebate Scheme, and the Household Support Fund (HSF). The Energy Rebate & HSF fund closed on 30th September 2022.</p> <p>The reintroduction of statutory reminders is a significant function that will be key in supporting the delivery of our services performance plans.</p> <p>We will ensure that the necessary signposting for any customers who may need extra support through this process is offered.</p> <p>It is also worth noting that the timing of The Local Council Tax Discretionary Energy Support Scheme launch coincides with the energy price increase which took effect from 1st October 2022. It is envisaged that this scheme will provide additional support to customers over the winter months.</p>				
Action plan				
Tasks to be undertaken			Completion due date	
Review performance indicator target to reflect changing conditions			Year End	
HOS has instructed to reinstate statutory recovery notices (first, second, final reminders and liability orders at Magistrates Court, additional costs incurred to customer)			Q3 – (First batch of statutory reminders scheduled to be issued 17 th October 2022)	
Reinstate recovery post Liability Order, for example if customer does not contact to make a suitable arrangement we can send a direct Attachment to Benefits (fixed deduction per week), Attachment to Earnings (% based on) Issue 14 Day Enforcement Notices, Instruct Enforcement Agents to proceed on cases they were dealing with pre covid. As a last resort escalate cases to Enforcement Agents for collection				
<p>Improvement expected: Improvements in performance may not be reflective until Q4. Whilst we will resume and implement normal recovery processes in a timely manner ensuring all scheduled notices meet the timelines, there remains some uncertainty about customers ability to pay. The CAS team and the back office will ensure that full support is given to signpost and support vulnerable customers struggling to pay. The HoS has requested monthly recovery performance to be presented to monitor our progress.</p>				
Plan prepared by : Revenues Manager				

PERFORMANCE PLAN				
Indicator	% locations inspected falling into particular categories			
Quarter Target	5%	Quarter outturn	8.33%	
<p>Reason(s) for not meeting target In Q2, the LAMS category <i>ES07* % locations inspected falling into categories C/D - Overflowing Litter Bins</i> has flagged as below target.</p> <p>Litter bins in the borough are all on scheduled collections, calculated by their location and frequency of use. If a bin is overflowing when it's collected, its collection frequency will increase. This should prevent the same bins regularly overflowing.</p> <p>Land Audit Management System (LAMS) quality inspection model areas are generated randomly and assigned to inspectors. Street cleansing inspections are undertaken on a sample of roads and graded from A to D. Although the data is then used to target specific areas for further review and amendment of street cleansing schedules, these areas may not come up in subsequent inspections.</p> <p>It should be noted that the Q1 indicator <i>ES11* % locations inspected falling into categories C/D - Detritus</i> had improved from 16.44% falling into C/D grades to 05.21%. These values are not directly comparable as the sample for Q2 is not the same sample used in Q1 as per the guidance for these indicators.</p>				
<p>Additional commentary / background</p> <p>LAMS is run through the Association for Public Service Excellence (APSE). The data is benchmarked with other local authorities.</p> <p>This year we have reviewed how we deliver our LAMS inspections and increased our team of trained inspectors from one to three officers. During review of Q1 information it was noted that sampling areas needed to be reviewed as cross border issues may have affected the result. When areas are being randomly selected some of the roads/streets fall into neighbouring authorities and shouldn't form part of the inspection regime. When we find such roads, we are able to re-allocate the road to a nearby one within the borough's boundaries.</p> <p>We inspect and report on: overflowing litter bins, grounds maintenance, detritus, litter and dog fouling.</p> <p>Due to the random nature of inspections should any of these categories flag as below target during a quarter the method to address the issues (and therefore actions within a performance plan) are consistent regardless of the category.</p> <p>A performance plan covering all LAMS inspections is therefore provided and applicable to all categories.</p>				
Action plan				
Tasks to be undertaken			Completion due date	
Work with APSE to ensure randomised areas are correctly assigned as WLBC owned land.			Complete – Inspectors have the ability to inspect nearby	

	streets that fall within the borough boundaries now.
Improvement Plan implemented into these areas to review performance and deploy resources where appropriate.	Complete – process in place
Inspectors have been trained. Refresher training has been undertaken where applicable.	Complete
Resources have been allocated to these locations to improve the standard of the areas inspected.	Complete
Review of cleansing schedules to ensure that these areas are covered on a regular basis to maintain adequate cleansing standards.	Complete
Improvement expected: Tasks will result in improvements to sites and the overall process but the random nature of the inspection areas means that improved areas may not impact on subsequent inspections. A date for overall improvement to the KPI cannot be realistically assigned.	
Plan prepared by: Technical Services Manager	

PERFORMANCE PLAN				
Indicator	BV8* % invoices paid on time (within quarter)			
Quarter Target	98.75%	Quarter outturn	93.81%	
Reason(s) for not meeting target Delays in receiving authorised invoices for processing into the Debtors & Creditors team from across the organisation.				
Additional commentary / background The target outturn has dipped slightly from the previous quarter. Whilst this performance indicator is monitored centrally, the Debtor & Creditor service has no overall control as the performance is down to individual service areas to ensure they process invoices timely.				
Action plan				
Tasks to be undertaken			Completion due date	
The monthly performance report that is distributed across the organisation will be reviewed and updated to ensure appropriate staff are kept informed and Managers reminded of the Invoice Processing timescales and instructions.			September 2022 (completed)	
The wording on the monthly performance email to Managers is being amended in line with performance for that month to highlight any upturn/downturn.			Monthly	
Service areas who are under performing will be contacted and asked to review their processes.			September 2022 (completed) Now ongoing month by month process.	
A detailed report which identifies those invoices that have failed the 30-day performance indicator produced. This data will be given to service areas to investigate the root cause on request.			Issued monthly to those service areas that are identified as under performing.	
The outturn of this PI is expected to improve as part of the implementation of the new Civica Financials system.			The project team are in the process of finalising the go live date – this is likely to be during Q4.	
Quarterly meetings with the Business Support Team and Creditors have been established.			Scheduled quarterly	
Service specific training is available as required.			Available upon request.	
Improvement expected: As stated above, this PI is monitored centrally. The actions detailed above should support service areas to monitor performance and improve as a result. It is anticipated that performance will improve with the implementation of the new Civica Financials system and change in processes as a result. Whilst some improvement may be seen in Q4, it will take time for the new system to embed and therefore further improvements may only be recognised in Q1 once staff become accustomed to the new processes.				
Plan prepared by Creditor & Debtors Manager				

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