

Agenda



Listening Learning Leading

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Date: 2 June 2021
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A MEETING OF THE

Cabinet

WILL BE HELD ON THURSDAY 10 JUNE 2021 AT 6.00 PM

**THIS MEETING WILL BE HELD AT 135 EASTERN AVENUE, MILTON PARK,
MILTON, OX14 4SB**

To watch this virtual meeting, follow this link to [the council's YouTube channel](#).

Members of the Cabinet

Member	Portfolio
Sue Cooper (Chair)	Leader of the Council, Cabinet member for climate change and nature recovery
Robin Bennett (Vice-Chair)	Cabinet member for economic development and regeneration, and deputy leader (statutory deputy leader during the following months: May, July, September, November, January and March)
Maggie Filipova-Rivers (Vice-Chair)	Cabinet member for community wellbeing, and deputy leader (statutory deputy leader during the following months: April, June, August, October, December and February)
Pieter-Paul Barker	Cabinet member for partnership, including the Five Councils' Partnership, and legal and democratic
Andrea Powell	Cabinet member for corporate services, policy and programmes
Leigh Rawlins	Cabinet member for finance
David Rouane	Cabinet member for housing and environment, and Didcot Garden Town
Anne-Marie Simpson	Cabinet member for planning

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ITEMS TO BE CONSIDERED WITH THE PUBLIC PRESENT

Reports considered with the public present are available on the council's website.

1 Apologies for absence

To record apologies for absence.

2 Minutes (Pages 4 - 12)

To adopt and sign as correct records the minutes of the Cabinet meetings held on 18 March and 8 April 2021.

3 Declaration of disclosable pecuniary interest

To receive any declarations of disclosable pecuniary interests in respect of items on the agenda for this meeting.

4 Urgent business and chair's announcements

To receive notification of any matters which the chair determines should be considered as urgent business and the special circumstances which have made the matters urgent, and to receive any announcements from the chair.

5 Public participation

To receive any questions or statements from members of the public that have registered to speak.

CABINET DECISIONS

6 Recommendations and updates from other committees

To consider any recommendations to Cabinet from other committees.

7 Performance management framework (Pages 13 - 47)

To consider the report of the acting deputy chief executive – transformation and operations.

8 Councillor community grant scheme (Pages 48 - 59)

To consider the interim head of corporate services' report.

9 Capital grants (Pages 60 - 72)

To consider the interim head of corporate services' report.

10 Policy on the council's public support for socially important topics and campaigns (Pages 73 - 79)

To consider the interim head of corporate services' report.

MARGARET REED

Head of Legal and Democratic

Minutes

OF A MEETING OF THE

Cabinet

HELD ON THURSDAY 18 MARCH 2021 AT 6.00 PM

THIS WAS A VIRTUAL, ONLINE MEETING.

Present:

Cabinet members: Councillors Sue Cooper (Chair), Robin Bennett, Maggie Filipova-Rivers, Pieter-Paul Barker, Andrea Powell, Leigh Rawlins, David Rouane and Anne-Marie Simpson

Officers: Pat Connell, Steve Culliford, Adrian Duffield, Mark Hewer, Simon Hewings, Jeremy Lloyd, Suzanne Malcolm, Lucy Murfett, Margaret Reed, Melanie Smans, and Mark Stone

Also in attendance: Councillors Mocky Khan and David Turner

69 Minutes

RESOLVED: to approve the minutes of the Cabinet meeting held on 4 February 2021 as a correct record and agree that the Chair signs them as such.

70 Declaration of disclosable pecuniary interest

Councillor Leigh Rawlins declared a personal interest in the item on the section 106 funding request from Sonning Common Parish Council (minute 76 refers).

71 Urgent business and chair's announcements

None

72 Public participation

Cassie Pinnells made a statement on behalf of Thame Town Council, in support of its application for section 106 funding towards a floodlit 3G artificial sports pitch.

73 Recommendations from other committees

Cabinet noted that the Scrutiny Committee had met on 1 and 8 March 2021 and made to following recommendations to Cabinet:

- support for Cabinet's decision on car parking fees and charges



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- support for a joint local plan with Vale of White Horse District Council
- support for the recommendations in the exempt report on the Covid-19 leisure support package

74 Budget monitoring

Cabinet considered the interim head of finance's budget monitoring report. This looked at the council's budget position for the period April 2020 to January 2021. This showed a revenue underspend and capital programme underspend, as detailed in the report's public and exempt appendices. During the period, the council's main priority was to provide a strong local response to the Covid-19 pandemic. This had resulted in the diversion of resources and the consequent reduction in work on other priorities. Cabinet thanked officers for their work during these unprecedented times.

RESOLVED: to note the contents of the interim head of finance's report to Cabinet on 18 March 2021.

75 A joint local plan

Cabinet considered the head of planning's report on a joint local plan. This proposed the development of a joint local plan with Vale of White Horse District Council, rather than the two councils working on separate plans.

The Cabinet member for planning saw many advantages to the proposal. It would allow the councils to work more closely together, share policies where appropriate, and share resources. Both councils' geography was similar, with rural areas and market towns, and a joint plan would allow for better planning of Didcot Garden Town. Both councils' corporate ambitions were similar; both had declared climate emergencies. A joint local plan would also save costs as the councils had a shared planning policy team, and could share the costs of evidence gathering and the public examination.

Cabinet agreed, believing that there were sound planning and practical reasons to develop a joint local plan. Cabinet was reassured that, if necessary, local policies could be included in a joint plan to reflect local needs. This would overcome the disadvantage of a joint plan covering a wider area and being less local. Cabinet also noted that the current, adopted local plan would remain in place until a new joint local plan was adopted.

Legislation allowed the councils to prepare a joint plan. Cabinet discussed the two methods of doing this:

- Section 28 of the Planning and Compulsory Purchase Act 2004 allowed two or more local planning authorities (district councils) to prepare a joint local plan. The county council in two-tier areas, such as Oxfordshire, could be part of the plan-preparation process but could not be part of the formal decision-making, as this remained the responsibility of the district councils. Under Section 28, the final, formal decisions at key local plan stages (consultations, publication, submission, adoption) were made either separately by each council or via a voluntary joint committee.
- Section 29 of the 2004 Act enabled the county council to continue to have a strategic planning role working with district councils. This allowed for the decision-making on a joint local plan to be conferred on a joint committee. Under

section 29, the county council would be a formal partner in the joint committee and therefore would have equal membership on that committee.

Given the context of development plan making across Oxfordshire, with a strategic plan (the Oxfordshire 2050 Plan) already underway, and a shared management and policy team already in place for South Oxfordshire and the Vale, Cabinet considered that a joint local plan should be prepared in accordance with section 28 of the Act. Scrutiny Committee had preferred the section 28 option also. Cabinet considered that officers should be authorised to prepare the detailed arrangements and hoped that all members could be involved in the plan preparation at relevant stages, through feedback sessions. Cabinet members asked officers to manage the risks by identifying them in the risk register, and by preparing contingencies and mitigations should the risks materialise.

RECOMMENDED to Council on 25 March 2021 to:

- (a) agree, subject to the agreement of Vale of White Horse District Council, the preparation and production of a Joint Local Plan with Vale of White Horse District Council;
- (b) approve the Joint Local Development Scheme (March 2021) attached at appendix 1 to the head of planning's report to Cabinet on 18 March 2021, and authorise the head of planning in consultation with the Cabinet member for planning, to make any updates;
- (c) agree the principle of governance to prepare and produce a Joint Local Plan under Section 28 of the Planning and Compulsory Purchase Act 2004, and authorise the head of legal and democratic, in consultation with the head of planning, the Leader and Deputy Leaders, and the Cabinet members for planning and legal and democratic, to agree the detailed arrangements; and
- (d) if recommendation (a) above is not supported, to agree the preparation and production of a South Oxfordshire Local Plan and to authorise the head of planning, in consultation with the Cabinet member for planning, to publish a Local Development Scheme and agree any updates to it.

76 Section 106 request - Sonning Common Parish Council

Councillor Leigh Rawlins declared a personal interest in this item as he was a member of Sonning Common Parish Council, and left the meeting during its consideration.

Cabinet considered the report of the acting deputy chief executive – place. This set out a request from Sonning Common Parish Council for section 106 funding towards ground levelling works, creating public access, and the installation of a fence along the western boundary at the Memorial Hall Field, Reade's Lane, Sonning Common. The project had the support of the parish council and the neighbourhood plan.

Cabinet supported the proposal.

RECOMMENDED: to Council on 25 March 2021 to

- (a) create a budget of £267,671 in the approved capital programme for the Memorial Hall Field project (ground levelling and access works and installation of fence along the

western boundary) in Sonning Common, to be funded by the section 106 contributions set out in the report of the acting deputy chief executive – place to Cabinet on 18 March 2021;

RESOLVED: subject to Council agreeing recommendation (a) above, to:

- (b) approve funding to Sonning Common Parish Council of £267,670.53, towards the Memorial Hall Field project in Sonning Common as detailed in the parish council's application;
- (c) authorise the acting deputy chief executive – place, in consultation with the head of legal and democratic to:
 - (i) agree a funding agreement with Sonning Common Parish Council regarding the terms of use of the section 106 funding; the instalments in which the funding is paid; the timing of instalments; the conditions subject to which instalments are paid; and to otherwise protect the interests of South Oxfordshire District Council as the provider of the funding; and
 - (ii) approve the payment to Sonning Common Parish Council of £267,670.53 towards the Memorial Hall Field project, subject to and in accordance with the funding agreement.

77 Section 106 request - Thame Town Council

Cabinet considered the report of the acting deputy chief executive – place. This set out a request from Thame Town Council for section 106 funding towards a new floodlit, 3G artificial turf sports pitch at the ASM Stadium, Meadow View Park, Thame.

Cabinet noted that this would provide a high standard sports pitch that could be used by multiple teams each week, even in the wettest parts of winter. This project had achieved widespread support in Thame, driven by the town council, local sports clubs and the local community. Cabinet supported the proposal.

RECOMMENDED: to Council on 25 March 2021 to

- (a) create a budget of £340,000 in the approved capital programme for a 3G Artificial Floodlit full-size football pitch project in Thame, to be funded by the section 106 contributions set out in the report of the acting deputy chief executive – place to Cabinet on 18 March 2021;

RESOLVED: subject to Council agreeing recommendation (a) above, to:

- (b) approve funding to Thame Town Council up to a maximum of £340,000, towards the installation of a new 3G artificial floodlit football pitch;
- (c) authorise the acting deputy chief executive – place, in consultation with the head of legal and democratic to:
 - agree a funding agreement with Thame Town Council regarding the terms of use of the section 106 funding; the instalments in which the funding is paid; the timing of instalments; the conditions subject to which instalments are paid; and to otherwise protect the interests of South Oxfordshire District Council as the provider of the funding; and

- approve the payment to Thame Town Council of up to £340,000 towards the installation of a new 3G artificial floodlit football pitch, subject to and in accordance with the funding agreement.

78 Exclusion of the Public

RESOLVED: to exclude members of the press and public from the meeting for the following item of business under Part 1 of Schedule 12A Section 100A(4) of the Local Government Act 1972 and as amended by the Local Government (Access to Information) (Variation) Order 2006 on the grounds that:

- (i) it involves the likely disclosure of exempt information as defined in paragraphs 1,2 and 3 of Part 1 of Schedule 12A of the Act, and
- (ii) the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

79 Covid-19 leisure support package

Cabinet made a recommendation to Council to approve a package of Covid-19 leisure support.

80 Budget monitoring

Cabinet noted the exempt appendices to the interim head of finance's budget monitoring report.



Minutes

OF A MEETING OF THE

Cabinet

HELD ON THURSDAY 8 APRIL 2021 AT 6.00 PM

THIS WILL BE A VIRTUAL, ONLINE MEETING.

Present:

Cabinet members: Councillors Sue Cooper (Chair), Maggie Filipova-Rivers, Pieter-Paul Barker, Robin Bennett, Andrea Powell, Leigh Rawlins, David Rouane and Anne-Marie Simpson

Officers: Steve Culliford, Andrew Down, Simon Hewings, Jeremy Lloyd, Suzanne Malcolm, Margaret Reed and Mark Stone

81 Declaration of disclosable pecuniary interest

None

82 Apologies for absence

None

83 Urgent business and chair's announcements

None

84 Public participation

None

85 Recommendations from other committees

Cabinet noted that there were no recommendations from other committees. For future Cabinet meetings, members asked for any updates from other committees to be reported also.

86 Strategic vision for Oxfordshire

Cabinet considered the report of the acting deputy chief executive – partnerships. This set out a strategic vision for Oxfordshire.

Cabinet recalled that in December 2020 it had received a report detailing the Oxfordshire Growth Board's ambition to develop a strategic vision for Oxfordshire. This provided an overarching framework for the Oxfordshire Plan 2050 but also served as an 'umbrella' under which both the Growth Board and its partners could develop the future plans and strategies.

The results of the consultation on the draft strategic vision had been supportive. As a result, the vision had been developed further. It now highlighted the importance of the need to address inequalities, and the role of Oxfordshire and its place as a national and international centre of excellence. Issues such as the need for inclusive growth had also been strengthened, and changes had been made to make the document more Oxfordshire specific, such as references to the rural landscape, the countryside, and the importance of the rural economy. The Growth Board had also commissioned consultants to offer sustainability advice on whether the vision was consistent, both within the document and when compared to the Oxfordshire Plan 2050, and whether there were any gaps in the sustainability issues identified. This commission had been completed and changes had been made to the final version of the strategic vision now before Cabinet.

Cabinet supported the proposed vision but believed that a short summary version was needed for better publicity. Cabinet was pleased that the vision had been improved in terms of equality, nature recovery, and climate change. Cabinet queried how the council would be able to influence the setting of measurements for the vision. However, generally, Cabinet considered the vision to be a good compromise.

Some concern was expressed that in the vision, good economic growth should focus on productivity growth of Gross Value Added per head of population, rather than on high population growth or mere overall Gross Value Added. It was noted that such detailed changes could be suggested at a later stage.

Cabinet also queried whether any progress had been made on revising the name of the Growth Board. It was noted that this might be re-visited after the County Council elections in May.

RESOLVED: to

- (a) agree the Strategic Vision for Oxfordshire; and
- (b) ask that officers consider how to embed the Vision's ambitions for Oxfordshire in future plans and strategies of the council.

87 Proposal to establish an Environment Advisory Sub Group of the Oxfordshire Growth Board

Cabinet considered the report of the acting deputy chief executive – partnerships. This set out a proposal for an Oxfordshire Growth Board Environment Advisory Sub Group.

The Growth Board's review of its own operating arrangements in 2020 had concluded that its work would benefit from a greater consideration of environmental issues. This could be done by strengthening the Board's structure and networks through an environmental work stream. The establishment of an environment advisory sub group was recommended to all principal councils in Oxfordshire. The proposal also supported many Growth Board

partners' declaration of climate and ecological emergencies and supported the environmental aims of the Strategic Vision for Oxfordshire.

Cabinet supported this move. This aligned with the council's declaration of climate and ecological emergencies, and with its corporate plan objectives. Also, the consultation on the Strategic Vision for Oxfordshire had identified the environment as top priority amongst young respondents. This proposal was a step in the right direction. The aim should be to promote environmental ambition, not just mitigation to reduce the impact upon the environment.

There would need to be a Growth Board environment work stream and delivery strategy. The establishment of a local nature partnership was one element of this, upon which some progress had already been made.

Cabinet suggested that the leader, Councillor Sue Cooper, should put herself forward to chair this sub group, as the Growth Board's other sub-groups were chaired by other councils' representatives.

Cabinet also endorsed the Oxford to Cambridge Arc Environment Principles, set out in appendix 3 to the report, and supported the development of an Arc environment strategy.

RESOLVED: to

- (a) support the establishment of a Growth Board environment advisory group;
- (b) endorse the Oxford to Cambridge Arc Environment Principles, as set out at Appendix 3 of the acting deputy chief executive's report to Cabinet on 8 April 2021, recognising that this statement of ambition applies to a diverse range of urban and rural communities, and that further evidentiary work will be required at a local level to understand their longer-term implications; and
- (c) support the development of an Arc environment strategy, which will provide for how the principles can be delivered.

88 Oxfordshire Electric Vehicle Infrastructure Strategy

Cabinet considered the report of the acting deputy chief executive – transformation and operations. This set out a draft strategy to provide the infrastructure for electric vehicles to 2025. This was an Oxfordshire-wide strategy that was being presented to all principal councils for adoption.

The strategy's objectives were to:

- enable and deliver public electric vehicle charging strategically across Oxfordshire
- adopt a common approach to managing electric vehicle charging in the council's car parks
- enable residents without access to private off-road parking to access a range of options for electric vehicle charging
- encourage new developments to install high quality electric vehicle charging infrastructure
- set standards for the quality of public electric vehicle charging in Oxfordshire to support development of a network, which was high quality, open, accessible and future-proofed

- work with partners to encourage other landowners to install electric vehicle charging infrastructure for businesses, residents and other users.

Cabinet thanked Councillor Caroline Newton, the council's representative on the Oxfordshire-wide member steering group, for her work and influence on this strategy.

The options open to Cabinet were to either adopt or not adopt the strategy. Cabinet believed that if it did not adopt the Oxfordshire strategy, the council could develop an alternative strategy to address the needs of South Oxfordshire. However, Cabinet considered this was a much wider issue. There were greater benefits of adopting a county-wide strategy, such as sharing of expertise and learning in introducing an electric vehicle infrastructure, greater access to external funding opportunities, economies of scale in working with others, and increased viability to engage with the private sector. Adopting the Oxfordshire strategy also supported the council's carbon neutral corporate objective to tackle the climate emergency.

Although the strategy was a step in the right direction to promote greener travel, Cabinet did not consider that electric vehicles were the panacea. There were environmental concerns over the production of batteries used to power electric vehicles. The materials used to manufacture batteries were sometimes mined from beneath the ocean floor, potentially causing environmental damage that would be difficult to monitor. The council should support measures to reduce the negative environmental impacts of electric vehicle battery production through, for example, responding to any relevant government consultations and backing research and innovation in new, less damaging technologies. The strategy would need to adapt to developing technology.

Cabinet also considered that the strategy needed to work on supporting electric buses and bicycles, with the aim of reducing reliance on cars. This in turn would reduce traffic congestion.

RESOLVED: to

- (a) adopt the recommended policies and key actions for the Oxfordshire Electric Vehicle Infrastructure Strategy (2020-2025); and
- (b) support measures to reduce the negative environmental impacts of electric vehicle battery production, through for example, responding to any relevant government consultations and backing research and innovation in new technologies.

The meeting closed at 6.50 pm

Chair

Date

Cabinet Report



Listening Learning Leading

Report of Head of Policy and Programmes

Author: Harry Barrington-Mountford

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Wards affected: All

Cabinet member responsible: Cllr Andrea Powell

E-mail: Andrea.Powell@southoxon.gov.uk

To: SCRUTINY 25/05/2021 and CABINET 10/06/2021

Performance Management Framework and Year 1 Corporate Delivery Plan

Recommendations

- (a) that Cabinet is asked to approve the performance management framework
- (b) that Cabinet is asked to approve the year 1 corporate delivery plan

Purpose of Report

1. To introduce the Performance Management Framework for South Oxfordshire District Council. The intention of this framework is to ensure that appropriate oversight can be provided by members into the delivery of council services in accordance with the approved corporate plan.
2. To introduce the set of measures contained within the Corporate Delivery Plan for South Oxfordshire District Council. These measures have been determined by cabinet members in discussion with relevant senior officers.
3. The contact officer is Harry Barrington-Mountford, Head of Policy and Programmes and James Carpenter, Head of Corporate Services for South Oxfordshire District Council (SODC) and Vale of White Horse District Council (VWDC).

Corporate Objectives

4. Openness and accountability.

Background

5. The performance management framework sets out the principles of performance management across the organisation, the governance framework through which

performance will be reported and reviewed, and the various key documents which will ensure that a culture of performance and accountability will be embedded throughout the organisation.

6. The corporate delivery plan details the specific reporting requirements against each aim contained within the corporate plan which came into effect on 30 October 2020. These measures have been designed after careful review of the corporate plan, the individual elements identified within the corporate plan that the council has control or influence over, the data which we already collect, and the resources available to support future reporting arrangements.

Performance Management and Reporting

7. The performance management framework when combined with the specific measures within the corporate delivery plan, provide a clear roadmap for reporting of performance across the organisation in a way that facilitates transparency and openness in accordance with the aims of the corporate plan. Once the framework has been approved, officers will work to embed the principles of performance management across the organisation and regular performance reporting will align with this framework.
8. During the first year of the approved framework being embedded across the organisation, there will be a defined review period to enable officers and members to review the approach, any feedback received and consider any additional requirements or changes to the reporting structure. Review outcomes and any proposed changes will be reported to the Scrutiny Committee and Cabinet as appropriate.
9. In acknowledgement that there has been a reporting gap between the corporate plan being approved on 30 October 2020 and the present day, officers have drafted an 'Interim Performance Report' covering the period, outlining key activity that has been undertaken against the priorities listed in the corporate plan, this is a one-off document and will not form part of regular reporting activity.
10. Please see attached to this report: Appendix 1 – Performance Management Framework, Appendix 2 – Corporate Delivery Plan (Year 1) and Appendix 3 – Interim Performance Report October 2020 – April 2021.

Climate and ecological impact implications

11. There are no direct climate or ecological implications arising from the report. A number of the identified measures relate to Corporate Plan themes that relate to climate and ecological implications, and therefore the reporting framework will act as a vehicle for the dissemination of the council's delivery and achievements in this area.

Financial Implications

12. There are no additional financial implications attached to the approval of either the performance management framework or the corporate delivery plan at this stage, there may however be some additional performance management resourcing requirement should the need arise or future reporting requirements change and/or financial implications linked to individual projects within the corporate plan that will be progressed as appropriate through the council's democratic processes.

13. Any council decision that has financial implications must be made with the knowledge of the council's overarching financial position. For Vale, the position reflected in the council's medium-term financial plan (MTFP) as reported to Full Council in February 2021 showed that the council is due to receive £2.6 million less in revenue funding than it plans to spend in 2021/22 (with the balance coming from reserves including unallocated New Homes Bonus).
14. This funding gap is predicted to increase to over £5 million by 2025/26. As there remains no certainty on future local government funding, following the announcement of a one-year spending review by government, and as the long-term financial consequences of the Coronavirus pandemic remain unknown, this gap could increase further. Every financial decision made needs to be cognisance of the need to eliminate this funding gap in future years.

Legal Implications

15. None

Risks

16. None

Other implications

17. None

Background Papers

- South Oxfordshire District Council Corporate Plan 2020-2024



South Oxfordshire District Council and the Vale of White Horse District Council

Performance Management Framework

Foreword – Sue Cooper, Leader, South Oxfordshire District Council

South Oxfordshire's Corporate Plan sets out six strategic themes that describe what we hope to achieve over the next four years. These themes are clearly important to our residents, with all of them being agreed as important in our consultation last year.



In my foreword to the Plan last year, I emphasised the rural nature of our district, with the need to focus on biodiversity and wildlife but also to balance the affordability of housing with over-development of our area.

Why is it important to have a Performance Management Framework (PMF)?

- The PMF is important as it measures what the council is doing against our priorities set out in the Corporate Plan 2020-24
- We know that residents are interested to know how well their council is doing from the very high response rate to the public engagement during 2020 (the most successful Corporate Plan engagement ever seen at the council)
- The PMF – with its quarterly reports and annual strategic review - will be a clear way to report on our performance to the public, in line with our theme of Openness and Accountability.

How will the PMF help us to deliver the Plan?

- By measuring what we are doing we will see progress, challenges, areas needing more emphasis or where priorities need to change. Some measures will be numerical and some will be descriptive.
- From high-level strategies down to individual workstreams, this establishes where we are and how far we have to travel to achieve the outcomes we want
- This is a change in how the council is run, creating a “golden thread” that links individual performance to our Corporate Plan

Providing opportunity for transparency, scrutiny and challenge

- This is not just about celebrating good news; it can also highlight problems to be overcome. It aims to provide transparency on what the council is doing and will help to hold us all to account.



Foreword – Emily Smith, Leader, Vale of White Horse District Council

Last year it was my pleasure to introduce the Vale of White Horse Corporate Plan for 2020-24, which set out the agreed priorities to help communities and people across the Vale of White Horse thrive.

As residents, you've shown your interest in what the council is doing. The public engagement exercise was the most successful Corporate Plan engagement in ten years at the council.

This Performance Management Framework (PMF) highlights how we intend to measure our performance against the priorities in the plan and provide opportunities for scrutiny and challenge.

As I emphasised in the Corporate Plan, we take seriously our responsibilities to meet national and local climate targets; we consider the climate emergency to be central to our work. This PMF provides the structure to see progress against this and our other priorities.

- It will measure what the council is doing to implement our priorities as set out in the Corporate Plan.
- The PMF, with its quarterly and annual strategic reviews, is the transparent process by which we intend to keep you informed.
- By measuring what we are doing, we will see progress, challenges, areas where more emphasis is needed, or where priorities need to change.
- From major themes set out in our Corporate Plan, to individual workstreams, the PMF will establish where we are and how far we have left to travel to achieve the outcomes we want.
- This approach improves how individuals and teams work together toward shared goals.

The PMF will provide the opportunity for transparency via scrutiny and challenge. It will identify successes and also point out where changes are needed. It will help hold us all to account.

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Introduction

Effective performance management plays a central role in putting our communities and residents at the heart of everything. It also enables them to see how well we are doing and how we intend to improve.

South Oxfordshire and the Vale of White Horse District Councils (the councils) have developed corporate plans which identify priorities which they will focus on until 2024.

The approach set out in this Performance Management Framework (PMF) will support the delivery of the priorities within the corporate plans, improve transparency and assist local people in holding the councils to account.

Openness, transparency and accountability is an inherent part of the council's culture and is fundamental to the achievement of our priorities set out in the corporate plans 2020-24. Moreover, they are essential to effective corporate governance. Therefore, this framework will further strengthen arrangements by enabling our decision making, processes, culture and effective leadership to further focus on the issues that matter to service users and the public.

This PMF has been designed to ensure that the councils' priorities are translated into clear plans with measurable targets which can be easily monitored by elected members and support effective implementation by officers.

The framework also sets out how we intend to measure our work and when we intend to report on this (and to whom).

Through measurements that reflect achievable progress, outside observers should understand how the councils approach strategic priorities and change. They will see quarterly reports to councillors that measure progress against priorities and a yearly report that sets out our progress and key achievements.

To officers, the framework should be embedded throughout their individual performance management. Through this, their line managers will be expected to work with them to understand how they as individuals, support the delivery of the councils strategic priority themes. This "golden thread" principle will allow our resources (staff) to focus on and prioritise the things that matter most to our residents and communities.

Enhancing Corporate Governance

Corporate governance is about doing the right things in the right way. It encompasses accountability and transparency in our actions and decisions.

In developing this framework, the following principles – which are designed to ensure that our processes and arrangements enable robust corporate governance – have been identified:

- **Embedding a strategic approach**

The framework should provide meaningful and accurate performance information and data to the right people at the right time. This will support the monitoring and implementation of the councils' strategic objectives as set out in our corporate plan.

- **Openness and accountability**

Performance management is everyone's responsibility and requires clear lines of accountability to facilitate openness and transparency. Performance information will be shared openly by default and used to take informed and transparent decisions. It will not be suppressed because it may reveal a lack of progress and/or underperformance.

- **Continuous improvement process and learning culture**

This framework should be underpinned by a culture of understanding what went well, what didn't work as planned, and what can be done better. There should not be a blame culture in how we are performing.

Corporate Delivery Framework

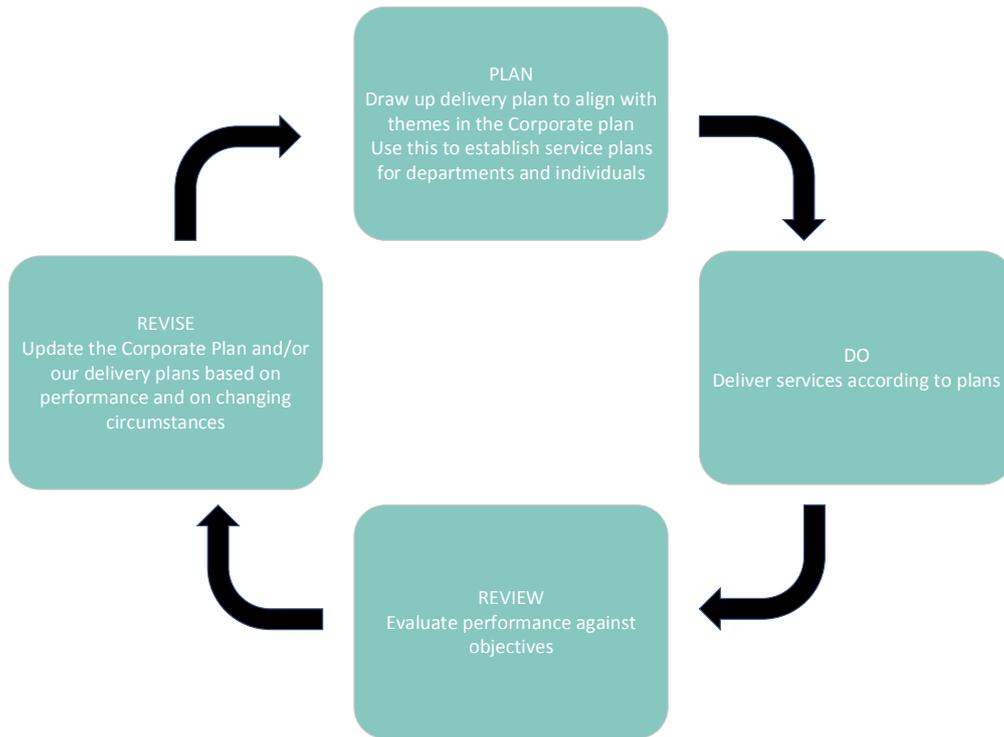
To enhance our corporate governance, the councils have implemented an approach to project management to improve the governance, oversight and control of projects. The Corporate Delivery Framework (CDF) provides a toolkit for staff to enhance successful project delivery. This framework will support the implementation of projects which are included in the annual delivery plans and through which the corporate plan priorities are delivered.

As an interim arrangement it is envisaged that the system which records and monitors projects within the CDF will be used to identify project progress. In the longer term the councils will be exploring the option of using an IT solution to facilitate quicker and simplified performance reporting.

Clear Priorities and Plans

Annual Business Planning and Performance Cycle

The councils have an annual business planning cycle in which they set their aspirations and priorities – illustrated in diagram 1 below.

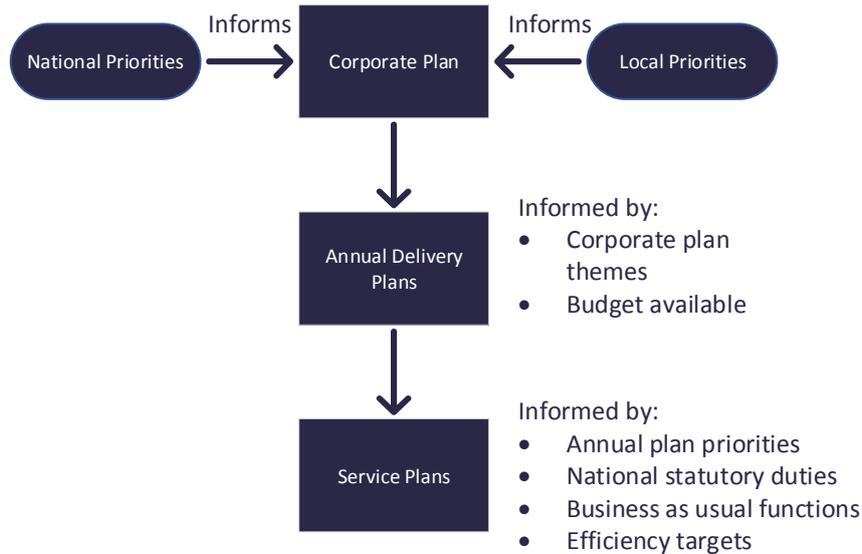


These aspirations and priorities are developed and articulated through several linked plans. These contain actions and measures on which progress is monitored by elected members and officers on a regular basis (quarterly and annually) as part of the performance management cycle.

The Corporate Plan

Corporate plans are developed every four years. They set out what the councils intend to achieve within the lifespan of the document.

The development of a corporate plan is informed by both national and local priorities. Diagram 2 below illustrates the range of plans which the councils produce and how we develop our actions to deliver the priorities set out in the corporate plans:



For 2020 -2024 the corporate plan priority themes are:

Vale of White Horse

1. Providing the homes people need
2. Tackling the Climate Emergency
3. Building healthy communities
4. Building stable finances
5. Working in partnership
6. Working in an open and inclusive way

South Oxfordshire

1. Protect and restore our natural world
2. Openness and accountability
3. Action on the climate emergency
4. Improved economic and community well-being
5. Homes and infrastructure that meets local needs
6. Investment that re-builds our financial viability

Each of the themes span service area and cabinet member portfolios.

Annual Delivery Plan

Each year the councils develop annual delivery plans which set out the detailed actions required over the next 12 months to deliver the priorities and objectives in the corporate plan.

The plan is usually developed at the beginning of a corporate plan annual cycle (illustrated in diagram 1) through a collaborative process between elected members and our Strategic Management Team (SMT) and aligned to budget setting.

Annual delivery plans are developed throughout the life cycle of the corporate plan and aim to:

- outline how the council intends to translate large strategic priorities into a set of actions to be delivered.

- set a series of measurements to show progress towards actions to deliver the corporate plans. These can be monitored quarterly and yearly within the PMF cycle.
- consider issues such as budget and resources which could impact on the delivery of the plans. This is used to inform budget-setting each year and ensure that the councils manage their resources effectively.
- provide clear signals to teams how their service plans should link to the corporate plans.
- align to the councils' Corporate Delivery Framework which supports effective project management and delivery.

Service and Team Plan

Services and teams will set their own goals for the year. These will reflect corporate and annual delivery plans and business as usual functions such as statutory responsibilities. Service plans should contain:

- actions that contribute to achievement of the councils' priorities as identified in annual delivery plans.
- actions that are driven by the need to improve efficiency and effectiveness in service.
- actions that relate to frontline service or delivery of statutory requirements, whether-or-not directly related to the council's priorities.
- align to the councils' Corporate Delivery Framework which supports effective project management and delivery.

Other Plans

There are a range of other plans and strategies that align with and contain actions that will help implement the corporate plan priorities and projects. Whilst lead responsibility for delivering these may sit within one team, activities may cut-across other areas of the council and/or partner organisations.

The relevant service lead is responsible for developing these plans and ensuring that they are robust, with proportionate governance and performance management arrangements in place.

Annual Strategic Review

The corporate plan will be reviewed annually to assess whether key projects and measures are still relevant and are continuing to deliver the actions we have set ourselves.

Measuring and Reporting Performance

Elected members of the Cabinet, Scrutiny and CEAC/CEEAC Committees will receive performance reports on a quarterly and annual basis. These reports evaluate the councils' progress in implementing corporate plan priorities and will ultimately be agreed and reviewed by Cabinet after the committee cycles. The committee meetings provide an opportunity to re-assess the corporate plan and annual delivery plans to ensure their continual relevance. Diagram 3 below illustrates this reporting and monitoring cycle:



Setting performance measures

A set of key strategic performance measures have been developed to monitor our progress in implementing councils' corporate plan priorities. Performance measures can be either Quantitative (Numeric) or Qualitative (narrative based e.g. case studies).

Performance measures should reflect progress against an objective and be something that the councils' actions can directly influence.

Quarterly Reports

These reports contain detailed data and information on the progress of corporate plan actions and measures. They also include financial and resource information which can be used to determine resource allocation to support the implementation of

priorities. In addition, details of remedial actions required to address a lack of progress or poor performance. This detailed evidence can then be used to revise timescales and activities as appropriate.

Annual Strategic Review

The annual strategic review will provide an opportunity to reflect on the councils' progress in implementing the corporate plan priority themes. It will be used to highlight key achievements and will include case studies to demonstrate positive impact on residents. The publication will be aimed at elected members, residents, staff and partner organisations.

The report should replicate the design of the corporate plans to demonstrate how they interlink and to provide visible and tangible progress on its implementation.

The annual report will be a key part of developing the annual delivery plan for the year ahead and allow elected members the opportunity to re-prioritise actions, projects or resources to respond to any changes in the council's landscape.

Performance Monitoring and Challenge

Effective performance management requires clearly defined and structured accountability. The councils have in place a range of mechanisms for monitoring, reviewing and challenging their performance. Performance management is a key responsibility of both officers and members as detailed below:

- **Cabinet Members**

Elected members hold ultimate responsibility for the services that the councils deliver.

Collectively Cabinet have overall responsibility for the delivery of the council's corporate plans. At the outset of the annual business planning and performance cycle, Cabinet must approve the annual delivery plans and in-year measures. It formally considers performance on a quarterly basis – focused on the actions and measures within the corporate plan and agrees remedial action to address a lack of progress or poor performance.

- **The Scrutiny committee(s)**

These are opposition-led bodies responsible for holding the Cabinet to account. Their role is to provide an appropriate level of challenge to Cabinet to ensure robust decision making.

Committee members will receive the quarterly reports and identify any remedial actions which need to be taken to ensure delivery against the council's priorities and make any necessary recommendations to Cabinet.

- **Lead Members (Portfolio Holders)**

Lead members have responsibility for performance of the services within their remit. To support this, they provide input into the development and monitoring of the corporate plans, as well as the service plans within their portfolio.

Officers provide relevant data and supporting information to support lead members with the performance challenge role.

- **Climate Emergency Advisory Committee (CEAC) and Climate and Ecological Emergency Advisory Committee (CEEAC)**

Each council's Climate Emergency Advisory Committee is responsible for advising Cabinet on matters relating to the climate emergency and biodiversity. This includes, advising on how the council can contribute to the delivery of national legally-binding targets on the climate emergency, the council's own targets on the climate emergency, and making recommendations on ways in which the council can reduce damage to the global and local environment through the delivery of its agreed Corporate Plan.

The quarterly reports should be reviewed by these committees to provide their input and any recommendations to Cabinet on relevant measures, progress or remedial actions.

- **Strategic Management Team**

SMT has collective managerial responsibility for overall council performance and implementation of the corporate plans. The role of SMT is to provide performance support and challenge across the councils. SMT assesses progress against the corporate plan actions and measures for Cabinet, outlining areas for suggestions and improvement and implementing relevant actions.

Members of SMT are also responsible for ensuring the completion of service planning for their respective areas.

- **Council Services**

Each council service is responsible for providing performance data and information. This could range from employee reviews, statutory data returns, or responding to requests for information, updates and case studies for the quarterly/annual reports. In particular, the following teams have distinct responsibilities, but are expected to work closely together:

- **Insight and Policy** – are responsible for the development in collaboration with elected members and SMT the annual delivery plan and the annual strategic review process. The team are also responsible for the compilation of the annual report.
- **Assurance** – are responsible for the implementation of the PMF. Producing the quarterly performance reports for SMT, Cabinet, Scrutiny Committee and the Council, ensuring full consultation ahead of publication. They are responsible for the collation of performance information from services across the council to include within the quarterly/annual reports.
- **Internal Audit** - are responsible for providing guidance and information on risk management, in addition to dealing with the provision of audit services. If data quality issues are identified through the course of an audit, whether linked to performance measurements or not, this will be raised in the audit report. Internal audit also provides an independent review of the corporate approach to performance management and data quality.
- **Strategic HR** - are responsible for overseeing the staff performance management process and fostering a culture that supports “blame free” continuous improvement.
- **Managers** - Managers play an essential role in improving performance and should adhere to the principles of the performance management framework in their everyday work. SMT will be developing further

guidance for managers on how they can facilitate discussions and actions to improve both service and staff performance.

- **Officers** - Each officer should be pro-active in understanding how they contribute to the priority themes within the councils' corporate plans and where they have any specific responsibilities for its delivery (for example providing service performance data for monitoring). The level of accountability and roles will vary among officers. Officers should identify opportunities to develop case studies to illustrate their positive impact on residents in delivering the councils' priority themes - as outlined in the Employee Performance section below.

Employee Performance

Effective people management is central to delivering council priorities and excellent services to the public.

The foundation of individual performance management is the “golden thread” principle in which officers identify how their role fits with the wider objectives as set out in the corporate plans, cascading down through service plans to individual workloads. It should be clear how the employee’s work contributes to different themes within the corporate plans or actions in their area’s service plan. This connects and enables all staff to focus on and prioritise the things that matter most to our residents and communities.

Employees participate in a continuous individual performance management process. Line managers agree objectives with an individual and review their progress towards these on a regular basis. Responsibility for the individual performance management process lies with individual employees and their manager. Each employee must actively participate in the process with objectives and progress reviewed regularly through one-to-one meetings outlining what went well and areas for future improvement.

Our approach also allows an opportunity for employees to detail their positive impact on residents in the form of case studies. These can be selected and included within the annual report to highlight exceptional employee performance.

South Oxfordshire District Council Corporate Plan Key Theme	Corp Plan ID	Stated Aim/Project Description	New Measure	Reporting Type	Reporting Interval	Proposed Cabinet Lead	Proposed Supporting Cabinet Member	Proposed Strategic Lead	Proposed Officer Lead
01. Protect and restore our natural world	PRN	Row for Theme-wide measure	Overall narrative report on the Activity undertaken by the Council to 'Protect and Restore our Natural World' - Broken down by Stated Aim, with input from key stakeholders across the organisation.	1. Narrative	Quarterly				Suzanne Malcolm
01. Protect and restore our natural world	PRN1	With partners, promote in-depth mapping and surveying of ecosystems across the district, planning for restoration of the natural world and working closely with land-owners and specialist agencies	Narrative report to include information on work with partners, and Habitat and Species data + changes/trends on a 12 month basis.	2. Narrative (quantitative elements)	Quarterly	Clr Sue Cooper	Clr Anne-Marie Simpson	Suzanne Malcolm	Adrian Duffield
01. Protect and restore our natural world	PRN2	Celebrate, protect and enhance our natural assets, including the River Thames and the AONBs and their setting, promoting our rural district for tourism, leisure and wellbeing	Narrative report to include information on work to manage natural assets and ANOBs (both internally and with partners)	1. Narrative	Quarterly	Clr Andrea Powell	Clr Robin Bennett	Suzanne Malcolm	Chris Trill
01. Protect and restore our natural world	PRN3	Encourage the use of natural processes to combat risks arising from climate change, such as meadows and trees to reduce flooding	Narrative report to include direct and indirect information on use of natural processes to combat risks of climate change. This should include new policy development and direct activity undertaken by the Council.	1. Narrative	Quarterly	Clr Sue Cooper	Clr Robin Bennett	Suzanne Malcolm	Chris Trill
01. Protect and restore our natural world	PRN4	Recognise and support the vital role of farming in economic and ecosystem resilience, local food provision and the recovery of soils and natural processes	Narrative report on activity undertaken with partners to encourage and support the vital role of farming in economic and ecosystem resilience (where possible, although this may be implicitly included in the information above).	1. Narrative	Annual	Clr Sue Cooper	Clr Andrea Powell	Suzanne Malcolm	Chris Trill
01. Protect and restore our natural world	PRN5	Call for the establishment of a Local Nature Partnership for Oxfordshire to promote an ambitious nature recovery programme, including tree and meadow planting, rewilding and providing habitats for wildlife including wildlife corridors	Narrative report - accepting that much of the activity to support PRN3 will be relevant here.	1. Narrative	Annual	Clr Pieter-Paul Barker	Clr Sue Cooper	Suzanne Malcolm	Michelle Wells
01. Protect and restore our natural world	PRN6	Work in partnership with the Earth Trust, Chilterns Conservation Board, North Wessex Downs AONB, the Environment Agency and others to improve access to green spaces in and around our towns, reinforcing access to nature as a priority for community wellbeing	Narrative report on activity with partners (including those named, and others), with a particular focus on work supporting the link between green spaces and community wellbeing.	1. Narrative	Quarterly	Clr Pieter-Paul Barker	Clr David Rouane	Suzanne Malcolm	Chris Trill
02. Openness and accountability	OA	Row for Theme-wide measure	Overall narrative report on the activity undertaken by the Council against the theme 'Openness and accountability'	1. Narrative	Quarterly				Adrianna Partridge
02. Openness and accountability	OA1A	Enhance trust and accountability in democratic decision-making, including live-streaming and recording of meetings, ensuring full accessibility of facilities and monitoring progress in an open and transparent way	Narrative update to include information on the performance management framework, communications update on Cabinet/Council decisions, IAG around the operations/activity of the Council % of Public Council meetings within 12 months available online	2. Narrative (quantitative elements)	Annual	Clr Andrea Powell	Clr Sue Cooper	Adrianna Partridge	James Carpenter
02. Openness and accountability	OA2	Ensure that council departments work collaboratively to deliver best outcomes for residents	Narrative report detailing significant, non-recurring examples of inter-departmental working which have secured concrete outcomes for residents	1. Narrative	Annual	Clr Andrea Powell	Clr Sue Cooper	Adrianna Partridge	James Carpenter
02. Openness and accountability	OA3	Embed an organisational culture that celebrates diversity, inclusion and respect	Narrative report on work undertaken to celebrate diversity, inclusion and respect. Should include standard recurring activity, one off supporting activity. This should be a joint report primarily from HR/Comms but include comments from others/	1. Narrative	Annual	Clr Maggie Filipova-Rivers	Clr Andrea Powell	Adrianna Partridge	James Carpenter
02. Openness and accountability	OA4	Apply good governance and transparency in all our working and decision-making, exploring optimal structures and mechanisms for best practice in local government	Narrative report on significant change initiatives which have resulted in restructures/new processes to deliver local govt services.	1. Narrative	Annual	Clr Sue Cooper	Clr Andrea Powell	Adrianna Partridge	Margaret Reed
02. Openness and accountability	OA5	Engage effectively with residents, Parish and Town Councils and other community organisations, using plain English in our communications and using appropriate methods and technologies to ensure equal and fair access for all	Narrative report on activities communications/engagement specific activities	2. Narrative (quantitative elements)	Annual	Clr Maggie Filipova-Rivers	Clr Andrea Powell	Adrianna Partridge	James Carpenter
03. Action on Climate Emergency	ACE	Row for Theme-wide measure	Overall narrative report on the Activity undertaken by the Council relating to 'Action on Climate Emergency'	1. Narrative	Quarterly				Suzanne Malcolm
03. Action on Climate Emergency	ACE1	Achieve our own zero carbon target by 2025 and support others to achieve the district target of zero carbon by 2030	Narrative report on strategic projects which will help to deliver net zero carbon for 2025/2030. This should be split between Council specific and District specific activities.	1. Narrative	Annual	Clr Sue Cooper	All	Suzanne Malcolm	Chris Trill

03. Action on Climate Emergency	ACE2	Develop an annually approved climate emergency programme and adequately finance it	Quantitative measure - delivery of an annual CEP Y/N	3. Quantitative	Annual	Clr Sue Cooper	Clr Leigh Rawlins	Suzanne Malcolm	Harry Barrington-Mountford
03. Action on Climate Emergency	ACE3	Deliver Council-owned net-zero homes and use grants, planning policy and advocacy to ensure the same standards throughout the district	Narrative Update on the current activities which WILL result in the delivery of Council owned homes (and details of those homes where possible)	2. Narrative (quantitative elements)	Annual	Clr Robin Bennett	Clr Anne-Marie Simpson	Suzanne Malcolm	Chris Trill
03. Action on Climate Emergency	ACE4	Promote and encourage behavioural change with informational campaigns and leading by example	Narrative update to include the number of communications campaigns undertaken which promote/encourage behavioural change (with examples).	1. Narrative	Annual	Clr Andrea Powell	Clr David Rouane	Adrianna Partridge	James Carpenter
03. Action on Climate Emergency	ACE5	Take positive action on single-use plastics, air quality improvement measures and sustainable transport	Suggested combined narrative update on Comms relating to single use plastics/comms relating to AQ initiatives and metrics relating to AQ (with an appreciation that this data will be squawed in 2020 due to lockdown(s))	2. Narrative (quantitative elements)	Annual	Clr David Rouane	Clr Sue Cooper	Suzanne Malcolm	Liz Hayden
03. Action on Climate Emergency	ACE6	Mitigate climate change through planning and land use, enhancing biodiversity on our own land and strengthening the planning system to enforce environmental standards	Narrative update to focus on planning initiatives which support the potential deliverables where possible (primarily the development of the joint 2041 Local Plan, the joint Design Guide and carbon reduction in planning (DES8/10))	1. Narrative	Annual	Clr Anne-Marie Simpson	Clr David Rouane	Suzanne Malcolm	Adrian Duffield
03. Action on Climate Emergency	ACE7	Promote the circular economy (reduce, re-use and recycle), including in our waste management contracts	Narrative measure on comms activity relating to waste/recycling Quantitative information on recycling rate, contamination rates, % of residual waste to landfill	2. Narrative (quantitative elements)	Annual	Clr David Rouane	Clr Andrea Powell	Suzanne Malcolm	Liz Hayden
03. Action on Climate Emergency	ACE8	Support and encourage local businesses to respond to climate change and nature recovery	Narrative update on the work influencing work undertaken to support and encourage local businesses relating to climate change and nature recovery	1. Narrative	Annual	Clr Robin Bennett	Clr Maggie-Fillipova Rivers	Suzanne Malcolm	Chris Trill
03. Action on Climate Emergency	ACE9	Promote waste minimisation initiatives such as Repair Cafés	Unless specific activity relating to Repair Café's and Freecycle can be reported on, suggest that this is covered in previous narratives	1. Narrative	Annual	Clr David Rouane	Clr Andrea Powell	Suzanne Malcolm	Liz Hayden
03. Action on Climate Emergency	ACE10	Work with Oxfordshire County Council to build on our commitment to active travel including walking, public transport and cycling infrastructure	Narrative update on work with Oxford County Council Optional Quantitative metrics on the amount of new footpaths/cyclepaths	2. Narrative (quantitative elements)	Annual	Clr Pieter-Paul Barker	Clr Sue Cooper	Suzanne Malcolm	Chris Trill
04. Improved economic and community well-being	ECW	Row for Theme-wide measure	Overall narrative report on the Activity undertaken by the Council relating to 'Improved Economic and Community Wellbeing'	1. Narrative	Quarterly				Adrianna Partridge
04. Improved economic and community well-being	ECW1	Partner with regional agencies to ensure economic recovery, quality employment, thriving businesses and vibrant communities, avoiding the blight of "dormitory towns"	Narrative report on work with partners in this area Quantitative metrics relating to employment rates (trends, actuals) - unemployment rate, trajectory/trend, earnings information	2. Narrative (quantitative elements)	Annual	Clr Pieter-Paul Barker	Clr Anne-Marie Simpson	Suzanne Malcolm	Chris Trill
04. Improved economic and community well-being	ECW2	Provide advice on access to grants, training and diversification programmes, helping local businesses to build agility and resilience	Quantitative measures - number of businesses we engage with, social media hits, newsletter subscribers, clickthrough rate, numbers of business grants awarded	3. Quantitative	Annual	Clr Robin Bennett	Clr Maggie-Fillipova Rivers	Adrianna Partridge	Chris Trill
04. Improved economic and community well-being	ECW3	Plan for communities connected by walking & cycling networks, with sustainable, accessible and affordable public transport and reliable Broadband, learning the lessons from the Covid-19 experience and enabling more home-working	Narrative update on work support reliable broadband (where possible) Narrative update on transport initiatives Quantitative - new footpath/cyclepaths delivered	2. Narrative (quantitative elements)	Annual	Clr Anne-Marie Simpson	Clr Maggie-Fillipova Rivers	Suzanne Malcolm	Chris Trill
04. Improved economic and community well-being	ECW4	Launch a new community wellbeing strategy to encourage and support culture, leisure and the arts	Approval/Launch of 'Community Wellbeing Strategy' Y/N (document should encompass large parts of information above)	3. Quantitative	Annual	Clr Maggie Fillipova-Rivers	Clr Andrea Powell	Adrianna Partridge	James Carpenter
04. Improved economic and community well-being	ECW5	Use our planning powers to preserve our valuable green spaces, particularly in urban areas	Number of Neighbourhood Plans implemented/green spaces secured	3. Quantitative	Annual	Clr Anne-Marie Simpson	Clr David Rouane	Suzanne Malcolm	Adrian Duffield
04. Improved economic and community well-being	ECW6	Work with our communities to maximise Community Infrastructure Levy funds and to allocate these to achieve best outcomes for residents in the District	Narrative update about work in this area to include detail of new CIL spending strategy, communication with parishes Quantitative elements - CIL Spend broken down by type, by parish	2. Narrative (quantitative elements)	Annual	Clr Robin Bennett	Clr Leigh Rawlins	Suzanne Malcolm	Chris Trill
04. Improved economic and community well-being	ECW7	Take enforcement action on fly-tipping and dog fouling	Small narrative on Fly Tipping/dog fouling activity (with Comms input on any campaigns) Qualitative data on fly tipping - what we collect, where from, how much, nature of enforcement action undertaken, hotspot map.	2. Narrative (quantitative elements)	Annual	Clr David Rouane	Clr Andrea Powell	Suzanne Malcolm	Liz Hayden
04. Improved economic and community well-being	ECW8	Work with local partners to introduce civil parking enforcement as a district responsibility	Narrative update on progress	1. Narrative	Annual	Clr David Rouane	Clr Pieter-Paul Barker	Suzanne Malcolm	Liz Hayden

05. Homes and infrastructure that meets local need	HILN	Row for Theme-wide measure	Overall narrative report on the Activity undertaken by the Council relating to 'Homes and infrastructure that meets local need'	1. Narrative	Quarterly				Suzanne Malcolm
05. Homes and infrastructure that meets local need	HILN1	Didcot Garden Town priority projects as identified by the Advisory Board, specifically a sustainable plan to redevelop the Didcot Gateway site, a public transport and active walking and cycling network, community facilities and accessible green spaces for Didcot residents	Narrative update against the stated aim, to include as many of the potential deliverables as possible, but not limited in scope to this.	1. Narrative	Annual	Clr David Rouane	Clr Robin Bennett	Suzanne Malcolm	Chris Traill
05. Homes and infrastructure that meets local need	HILN2	The transformation of Berinsfield into a thriving Garden Village with improved facilities that are developed in line with the community's needs and aspirations	Narrative update against the stated aim, to include as many of the potential deliverables as possible, but not limited in scope to this.	1. Narrative	Annual	Clr Robin Bennett	Clr Anne-Marie Simpson/Clr Leigh Rawlins re: finance	Suzanne Malcolm	Chris Traill
05. Homes and infrastructure that meets local need	HILN3	New council-owned homes with a focus on quality of design, affordability and local requirements	Narrative Update on the current activities which WILL result in the delivery of Council owned homes (and details of those homes where possible) Potential direct link to ACE 3? Also reporting on progress of Design Guide.	1. Narrative	Annual	Clr Robin Bennett	Clr Anne-Marie Simpson	Suzanne Malcolm	Chris Traill
05. Homes and infrastructure that meets local need	HILN4	Support and encouragement for the retrofit of our existing housing stock for low-carbon performance and to eliminate fuel poverty	Narrative update on current/completed activities and influencing activity.	2. Narrative (quantitative elements)	Annual	Clr Sue Cooper	Clr Leigh Rawlins	Suzanne Malcolm	Harry Barrington-Mountford
05. Homes and infrastructure that meets local need	HILN5	Elimination of homelessness in our District	Narrative update on progress in this area Quantitative information on - Homelessness rates, homeless cases and TA numbers, length of stay in TA and effectiveness of interventions (avoided homelessness)	2. Narrative (quantitative elements)	Annual	Clr David Rouane	Clr Maggie Phillipova-Rivers	Suzanne Malcolm	Liz Hayden
05. Homes and infrastructure that meets local need	HILN6	Bringing empty properties back into use	Narrative update on any relevant initiatives to reduce the number of empty properties and any data on empty property levels in South Ox	1. Narrative	Quarterly	Clr David Rouane	Clr Robin Bennett	Suzanne Malcolm	Chris Traill
05. Homes and infrastructure that meets local need	HILN7	Ensuring that our teams are ready to access or signpost to any Government schemes or funding that is made available	Narrative update on signposting activity and if possible, update on take-up.	2. Narrative (quantitative elements)	Annual	Clr Robin Bennett	Clr Maggie Phillipova-Rivers	Adrianna Partridge	Harry Barrington-Mountford
05. Homes and infrastructure that meets local need	HILN8	New homes are future-proofed, meeting the highest environmental standards and enhancing nature through sensitive, high quality design	Narrative update around refresh of the design guide, local plan, and information around DES10	1. Narrative	Annual	Clr Anne-Marie Simpson	Clr Sue Cooper	Suzanne Malcolm	Adrian Duffield
05. Homes and infrastructure that meets local need	HILN9	Spatial planning embeds public health, wellbeing and sustainability	Narrative update on work around planning reinforcing wellbeing and sustainability. This should include 'health based planning data' where possible - information on public gym equipment - footpaths, cyclepaths etc.	1. Narrative	Annual	Clr Pieter-Paul Barker	Clr Anne-Marie Simpson	Suzanne Malcolm	Adrian Duffield
05. Homes and infrastructure that meets local need	HILN10	Changes over time in our stock of homes meet local needs	Narrative update based on information available from 3rd parties and the impact this has on the local area Bedroom mix in new developments breakdown every 6 months	2. Narrative (quantitative elements)	Quarterly	Clr Anne-Marie Simpson	Clr Leigh Rawlins	Suzanne Malcolm	Adrian Duffield
05. Homes and infrastructure that meets local need	HILN11	Sustainable transport solutions prioritise walking, cycling and public transport to reduce car dependency and air pollution	Narrative update on overall progress relating to sustainable transport solutions - particularly EV elements.	1. Narrative	Annual	Clr Pieter-Paul Barker	Clr Robin Bennett	Suzanne Malcolm	Chris Traill
06. Investment that rebuilds our financial viability	ERFV	Row for Theme-wide measure	Overall narrative report on the Activity undertaken by the Council relating to 'Investment that rebuilds our financial stability'	1. Narrative	Quarterly				Simon Hewings
06. Investment that rebuilds our financial viability	IRFV1	Develop and implement an innovative Transformation Strategy to diversify our revenue streams, improve our effectiveness and secure our on-going viability	Narrative measure relating to the development of an overarching Transformation Strategy and any overall narrative linking to potential deliverables Quantitative data - Income relative to Net expenditure (in context), this could be broken down by service.	2. Narrative (quantitative elements)	Annual	Clr Leigh Rawlins	Clr Andrea Powell	Simon Hewings	Adrianna Partridge
06. Investment that rebuilds our financial viability	IRFV2	"Invest to save" for the District, including the delivery of sustainable new Council offices – on time and within budget – to realise future operational efficiencies	Narrative on progress of the Corporate Office project, including data on current spend on office accommodation which will no longer be spent once project completed. Further narrative to discuss impact of new building finances.	2. Narrative (quantitative elements)	Annual	Clr Leigh Rawlins	Clr Andrea Powell	Simon Hewings	Adrianna Partridge
06. Investment that rebuilds our financial viability	IRFV3	Exercise strong Stewardship of all Council assets including property and financial investments, optimising their performance for the benefit of our residents	Narrative update on the progress of the SPR, in the initial period detailing the scope and shape, then once SPR has been delivered, the outcomes and future measures (quant element)	2. Narrative (quantitative elements)	Annual	Clr Leigh Rawlins	Clr Sue Cooper	Simon Hewings	Chris Traill

06. Investment that rebuilds our financial viability	IRFV4	Maximise external funding opportunities to support our services and to enrich our leisure, sporting and community activities	<p>Narrative update relating to external funding utilisation, both funding received direct to the council, and projects which have received part external funding or are in progress if not already delivered.</p> <p>Specific elements which should be included - Proportion of spend on leisure/community facilities vs amount funded by Council.</p> <p>CIL/106 spend broken down by type/parish</p> <p>Externally funded Capital schemes</p> <p>Total External funding received figure - narrative should be clear that this is not the total figure.</p>	2. Narrative (quantitative elements)	Annual	Cllr Maggie-Fillipova Rivers	Cllr Robin Bennett	Simon Hewings	Chris Traill
06. Investment that rebuilds our financial viability	IRFV5	Invest responsibly and ethically with the Climate Emergency at the heart of what we do	Narrative update detailing changes which have included climate elements into regularised decision making.	1. Narrative	Annual	Cllr Leigh Rawlins	Cllr Robin Bennett	Simon Hewings	Simon Hewings

Interim Performance Report

South Oxfordshire District Council

Corporate Plan 2020-24

May 2021

How performance is measured

The council's activities are guided by our four-year corporate plan for 2020-2024, and by fulfilling our statutory responsibilities. Key measures will be reviewed and reported via quarterly and annual corporate plan performance reports. The reports will be subject to an input and approval process by the council's senior management team, Scrutiny Committee, Climate Emergency Advisory Committee and Cabinet, and then published on the council's website. It should be noted that:

- The new corporate plan came into effect on 30 October 2020;
- Some of the themes in the new corporate plan relate to new priorities;
- The updates used in this document will not necessarily be the same as will appear in the quarterly corporate plan performance reports; and
- The corporate approach to performance management is currently being redesigned.

Many of our services are provided through contractors, and the performance of our five major contractors will be monitored through an annual review and report to the council's Joint (with Vale of White Horse District Council) Scrutiny Committee.

Corporate Plan 2020-24

The Council's Corporate Plan 2020-2024 contains six strategic themes:

- Protect and restore our natural world
- Openness and accountability
- Action on the Climate Emergency
- Improved economic and community wellbeing
- Homes and infrastructure that meet local needs
- Investment and innovation that rebuilds our financial viability

The South Oxfordshire District Council Corporate Plan for 2020-2024, sets out what we hope to achieve for South Oxfordshire over the next four years. Following a successful engagement with residents, we reviewed hundreds of responses which have informed the priorities that the council will deliver. The plan was adopted at a full council meeting in October 2020.

Feedback from residents and partners was that the Council needed to focus on new priorities such as protecting the environment, mitigating the Climate Emergency and ensuring effective transparency and accountability.

Although work is underway on these new themes, we are continuing to explore how best we can effectively invest, resource and deliver these. During the development of the Plan, there was much uncertainty about the future of local government, both in terms of its structure and its financing, this uncertainty remains, and we are working to position ourselves to respond to the changing landscape we operate within. This has meant we have had to prioritise what we want to deliver. Some of the Corporate Plan projects have now been included in our budget for the year ahead, whilst others require more detailed scoping and consideration.

The Plan was developed during the COVID-19 pandemic and reflects the need to focus on a sustainable recovery that prioritises community well-being and resilience as well as economic prosperity so we will include an update going forward on our work to recover from the COVID-19 pandemic as we monitor the performance of the Plan.

This report provides a summary of activity since the Plan was adopted in October 2020.

Covid-19 – Community Hub and roadmap

The continuing impact of the pandemic on the Council's performance can be seen in this report. The majority of councillors and officers continue to work from home, other than those whose work requires otherwise, in those cases the appropriate risk assessments are taken and government guidelines are followed. We are proud of the quick and efficient response delivered by our services to support our communities during this time.

We are continuing to help residents and businesses. The Community Hub puts residents in touch with a network of volunteer groups and organisations to help with food, medicine and friendly phone calls. In urgent cases, support is available for food and prescription deliveries. A total of 397 food parcels have been delivered to residents since the start of the pandemic, and 498 medicine collections took place across both South Oxfordshire and the Vale of White Horse. This builds on a range of information and advice available for the public and businesses on our website, such as how to book a vaccine and how to obtain financial support.

As well as dedicating significant officer resource to the pandemic, including community testing, the council have also made its buildings available. Since Cornerstone Arts Centre closed its doors to the public in March last year, it has been home to the council's food distribution service, helping to ensure hundreds of families received urgent food parcels.

We're working with our partners at the county and district councils, local GPs and the Oxfordshire Clinical Commissioning Group on a COVID-19 vaccination outreach scheme. There are a range of reasons why people might not have responded to their invitation to arrange a vaccination - from difficulties in booking an appointment or arranging transport, to hesitancy or misunderstandings about the vaccine. Our officers, will be providing the people they speak to with help to book an appointment, arrange transport, or simply offering information and advice in a format agreed with our NHS colleagues. We are using the feedback we're getting from residents and the

outcomes of visits to help build up a detailed picture of why people may be not taking up the opportunity of vaccination.

We hope this outreach programme will be a valuable tool in ensuring that everyone who wants the vaccine can be supported to get it and that nobody gets left behind in the rollout of Oxfordshire's vaccination programme. The outreach scheme has been recognised by Oxfordshire CCG and the NHS regional team as an exemplar piece of novel work that has increased uptake within our communities.

We have also visited 268 people across South Oxfordshire and the Vale of White Horse who the NHS test and trace national system has been unable to reach. The employment of 2 Government funded COVID-19 Compliance Marshals has enabled us to encourage and support businesses to trade in a 'COVID-19 secure' manner, and to provide further advice to the public. So far, £41.3 million have been paid in financial support to businesses in South Oxfordshire, through a range of HM Government grant schemes.

As part of the council's initial response to the pandemic, each councillor was provided with £2,000 for them to spend directly to support communities trying to respond to the crisis.

As the COVID-19 vaccination programme continues to progress well, our frame of thinking is moving to the medium/longer-term. The Oxfordshire Economic Recovery Plan has been developed and we will soon be developing the councils plan, that will provide a route map for recovery from the COVID-19 pandemic, and the impact it has had on our residents, the council and businesses.

Theme 1: Protect and restore our natural world

In February 2021, an Ecological Emergency was declared by the Council to add further weight to its commitment to protect and restore the natural world. The declaration includes:

- Changing the name of the Climate Emergency Advisory Committee (CEAC) to the Climate and Ecological emergencies Advisory Committee (CEEAC).
- Setting up a Biodiversity Working Group to identify and prioritise new nature protection and restoration initiatives across the council, including COVID-19 recovery projects.
- Appointing two Councillors as Tree Champions.

An officer working group is developing a Tree Policy for consideration by council in July 2021 and we are undertaking engagement on plans to set up a county wide Local Nature Partnership to explore to further opportunities to enhance and restore our natural world.

South Oxfordshire District Council has also agreed to take action to try and minimise light pollution in the district, a motion put forward set out the harmful impacts of light pollution on human health and sleep, biodiversity and carbon emissions. It highlighted the need to provide infrastructure that ensures dark skies are possible and limits light pollution. The Council recognises the importance of the issue and has welcomed the work being undertaken by the All-Party Parliamentary Group on Dark

Skies – including its ten policy recommendations for HM Government and is lobbying for them to be implemented.

At this years’ Town and Parish Forum, we will be holding a workshop on the natural environment and a biodiversity talk from a local organisation who will share their advice on engaging with communities on protecting nature. The theme of the forum is called: ‘Climate Action – how can we take action together’ and the aim is to gain feedback on our forthcoming climate action plan and explore joint working opportunities.

Theme 2: Climate Emergency

In April 2019 the Council declared a Climate Emergency which was followed by a pledge to become a carbon neutral council by 2025 and a carbon neutral district by 2030. A Climate Action Plan for 2021-24 has been developed and annual climate action work programme approved. We have completed baseline reviews and scenario modelling to enable the development of a robust climate action plan.

While the Covid-19 pandemic created many challenges in 2020/21, there were also some positive outcomes, including a reduction in the Council’s carbon emissions. The table below shows the key operational areas in which emissions reductions were made in the first three quarters of 2020/21

South Oxfordshire CO ₂ emissions (tonnes) Quarter 1 to Quarter 3 2020/21				
	2019/20	2020/21	Change on 2019/20	% change on 2019/20
Leisure Centres	923	363	-560	-60.67%
Council offices	67	50	-17	-25.37%
Cornerstone	78	49	-29	-37.18%
Staff mileage	24	11	-13	-54.17%

The leisure centre reductions can be attributed exclusively to closures due to Covid-19 related closures and restricted access. We know that sustained reductions will only be achieved through the implementation of decarbonisation projects.

For office and staff related emissions there is an opportunity to consolidate some of the emissions reductions into longer term adjustments to working arrangements. Though it should be noted that carbon emission savings from the council buildings will have transferred to some extent to individual officer’s homes.

We have secured county wide funding from Green Homes Grant Local Authority Delivery Scheme in February 2021. At least 150 homes across Oxfordshire will be made more energy efficient because of the successful county-wide bid for £1.5 million of government funding. The county council will be working together with expected delivery partner the National Energy Foundation (NEF) to help less well-off

households retrofit their homes with energy saving equipment – cutting families' fuel bills while at the same time helping to reduce the county's carbon footprint.

NEF, a registered charity with expertise in energy efficiency and fuel poverty, will work with the county's five city and district councils (Cherwell, Oxford City, South Oxfordshire, Vale of White Horse and West Oxfordshire) to identify properties that fit the criteria.

Following feedback from the review into their operations, The Oxfordshire Growth Board has established an Environment Advisory Group to complement their work. This group will advise (i.e. non decision making) and provide strategic oversight of Growth Board work, provide a read across and challenge to ensure synergies between Oxfordshire strategies and develop proposals for addressing these strategic gaps lobbying for and gaining HM Government support for addressing environmentally issues for Oxfordshire at scale. The Leader of South Oxfordshire will Chair the advisory group and South Oxfordshire will also have a Cabinet Member representative on the group. It is anticipated that this group will join up with the Oxford Cambridge arc leaders group and its Senior Responsible Officer will be involved in the arc environment working group ensuring effective collaboration on both strategic programmes in Oxfordshire.

Cabinet has endorsed the Oxfordshire Electric Vehicle (EV) Infrastructure Strategy to ensure that anyone wishing to buy an EV will have access to convenient charging facilities. A Park and Charge project will install EV chargers in 5 public car parks this year.

The residents in South Oxfordshire are the second-best recyclers in England. South Oxfordshire recycles 64 per cent of its waste, this puts the district above the national recycling rate of 45.5 per cent and means that we have consistently been in the top ten in the past five years.

New website content on Climate Action has been launched to promote and raise awareness of the climate emergency and provide advice and support to residents and businesses. We have amended our decision-making templates to include climate and ecological implications to embed the Climate Emergency at the heart of our decision-making. This year's Town & Parish Council Forum is titled 'Climate Action – how can we take action together' and will discuss how to work together on making the district carbon neutral by 2030.

Theme 3: Openness and accountability

The Council are developing a new Performance Management Framework to further enhance residents and partners ability to see progress on implementing our priorities set out in the Corporate Plan 2020-24 and recognise cross-departmental working ensuring that council departments work collaboratively to deliver best outcomes for residents.

We have completely rebuilt and relaunched our websites to make them easier to use for everyone, including those who are new to interacting with the councils online and those who have accessibility challenges, like visual impairments. We have used direct and effective communications tools to keep all of our communities, staff, councillors, partner organisations and volunteer groups well-informed on a daily

basis during the height of the pandemic. We used highly engaging digital communications to get across complex messages to both inform, educate and reassure the general public and other customers about the Covid-19 pandemic.

We have also had around 11,300 views of our committee meetings for South Oxfordshire District Council and the Vale of White Horse District Council since they started online at the beginning of the pandemic. The High Court have now ruled on whether or not virtual committee meetings could continue, and the news is that 'primary legislation' is required to continue with this approach.

This means the council will be returning to face-to-face committee meetings after the elections in May. The councils have been planning for this outcome for some time and need to finalise and implement the necessary arrangements.

We'll have further information on the arrangements for this during the month of May, particularly around how it will work for staff who need to attend committee meetings and residents that would like to participate.

HM Government are consulting on whether to legislate for virtual meetings in the future, having acknowledged the increased participation overall and the environmental benefits of this approach.

We also used innovative communication methods to educate residents about day-to-day council work, including providing an online educational recycling quiz, which more than 2,000 people took part in.

We have put a new post in place for a senior officer to lead the improvement of our online and digital communication and engagement to ensure the councils don't stand still, but continually innovate and develop how our communities interact with us.

We've carried out 55 consultations, surveys and other engagement projects. This includes 24 statutory consultations, and 12 pieces of internal engagement with staff and councillors.

Over 1,700 people responded to our public consultation on the Corporate Plan proposals for both South Oxfordshire and the Vale of White Horse District Councils, which helped shape the councils' key priorities for the next four years, by far the most responses we've had to a Corporate Plan consultation for at least 10 years. Our consultation and engagement work helped shape and ratify updated and amended council policies, including statutory documents like our Off-Street Parking Orders and our Statement of Community Involvement for Planning.

We are using feedback to help shape the some of the councils' response to Covid-19 too, by carrying out a Lockdown Lifestyle survey with our Active Communities team, in which nearly 1,800 respondents told us how the first lockdown affected their physical and mental health.

Furthermore, we have are continuing to use technology to engage with partners including through Didcot Garden Town Parish Councils Sounding Board to and a Town and Parish Council virtual tour and climate change session.

The Council has also introduced external consultation tracking mechanisms earlier this year as a part of our aim to give greater strategic oversight and make sure we are having as much influence as we can. The council responds to consultations on proposed changes in policy and operations from a number of different sources.

Adding increased co-ordination and tracking to this work will ensure the council can best make their voice heard, whether we can strengthen our voice by exploring joint submissions or working more closely with the Local Government Association and District Council Network where they are preparing a submission and help us to decide whether there is adequate value in responding to some consultations at all.

We have responded to 9 non statutory consultations across a range of issues, including the National Planning Policy Framework and National Model Design Code, Local Transport Connectivity Plan and the future of the New Homes Bonus funding consultation.

We are also currently developing a Grants Policy to support the corporate plan and encourage diversification of funding streams for voluntary and community sector groups.

Theme 4: Improved economic and community wellbeing

South Oxfordshire has a large number of small and micro businesses and is well placed to adapt to changes in the economy, but support will be needed for it to remain a healthy and vibrant place to live and work. The pandemic has shown the strength of the community but there are areas of isolation and deprivation in our district, and the benefits of access to culture, leisure and community for all has been made clear.

Didcot and the Science Vale area (including part of neighbouring Vale of White Horse District) have been a focus for a significant amount of housing and business growth as we work to attract high-tech and design-based business into the area, and to support our Small- and Medium-sized Enterprises (SMEs) to grow. Our first enterprise zone, EZ1, covering Milton Park and Harwell, is performing strongly. Our second Enterprise Zone, EZ2, covers a number of sites in South Oxfordshire, including a portion of the former Didcot power station site and the Southmead sites. It has been in place since 2016, and is seeing some early wins in terms of inward investment and some large businesses moving in. Although very few of these sites are in South Oxfordshire, they form part of the wider Science Vale and Didcot growth areas and bring jobs and infrastructure improvements to the local economy. Improvements to infrastructure which are partially funded by the Enterprise Zones, such as the Milton Interchange, bring benefits directly to South Oxfordshire residents.

Since the outbreak of the pandemic, our COVID -19 response has been integral to supporting businesses and communities in the district. The Community Hub has supported hundreds of residents across the district whilst also encouraging patients who have been invited for a vaccine and not accepted the offer. So far, a total of £40.4 million have been paid in financial support to businesses in South Oxfordshire, through a range of HM Government grant schemes. The work on the Oxfordshire and local Economic Recovery Plan will provide an economic route map for recovery from the COVID-19 pandemic.

Work has commenced on the concept of healthy place-shaping to create sustainable well-designed communities where healthy behaviours are the norm. We will develop a collaborative policy and influencing framework to wrap around and support local

areas and continue to attend the Oxfordshire Health Improvement Board and Oxfordshire Health Overview and Scrutiny Committee to ensure the council aligns and contributes to health and wellbeing in its broader sense.

Our Didcot Garden Town Team have implemented a range of activity to promote healthy living, including an arts and culture map trail project, Science Vale Cycle Network (SVCN) improvements making connectivity easier between the surrounding employment centres and key urban areas, a Pop Up spaces project and the introduction of Street Tag - a fun, free smartphone app that offers rewards for exercise. Through our Active Communities Team, we offered out-reach to promote activity across the district, for example organising health walks, when Covid-19 restrictions have allowed.

Following government advice that leisure centres can start to reopen South Oxfordshire and their leisure contractor GLL, which runs the Better leisure centres across the districts, have agreed on a phased approach to re-opening. The councils' have already resumed some of their outdoor sessions, such as Nordic Walking, and these are also following strict Covid-19 rules. In line with the government restrictions the council will also take a phased approach to re-opening their outdoor pool, at Riverside in Wallingford. Last year both pools remained shut as a result of the lockdown restrictions. The current plan is to open the pools for the summer season. This is subject to continued progress towards the government's roadmap out of lockdown.

Though by carrying out a Lockdown Lifestyle survey with our Active Communities team, in which nearly 1,800 respondents told us how the first lockdown affected their physical and mental health we know the way residents want to keep active has changed and we will be working to incorporate this feedback.

Work is also underway with local partners to transfer civil parking enforcement responsibility from Thames Valley Police to the district.

We have also opened all of our community centres on Great Western Park. The Northern, District and Southern centres, two of which are brand new buildings, and are now available for residents and groups to hire with priority bookings given to groups helping to support Covid-19 responses.

Last year, the district councils took over the District and Southern centres from Taylor Wimpey and, during lockdown, have modified them to ensure they comply with health and safety regulations, and work has been carried out on all three centres to introduce all the necessary Covid-19 safety measures.

We have also made changes to the way the council spends Community Infrastructure Levy (CIL) funds which will mean that money secured from housing developments in the district will be released for projects that make a significant difference to communities and help fulfil the strategies outlined in the corporate plan 2020-24.

As part of our commitments to help the districts become carbon neutral, we have struck up a new partnership to help local businesses reduce their carbon footprint. We're aiming for an ambitious net-zero target in South Oxfordshire, and our businesses have an important role to play in achieving this goal. As strategic partners, the council will be working with Oxfordshire Greentech to help connect

businesses with specialist suppliers, customers and support organisations, and access funding streams and networking opportunities to help them minimise their emissions and impact on the environment. The councils' South and Vale Business Support team will be partnering with the countywide network organisation to host events to show businesses how they can recycle more and reduce waste, how to incorporate sustainable procurement in their processes and to build in sustainability training.

We have a long history of supporting communities to help themselves through grant funding for projects.

Theme 5: Homes and infrastructure that meet local needs

Because of the high demand for housing, the attractive and accessible nature of our district, and the high house prices, our key challenge on housing is to facilitate the delivery of new housing and achieve an appropriate mix of housing to meet local need.

Following the submission of our *Local Plan 2034* in March 2019, the new administration (May 2019) sought to review it. However, the Secretary of State imposed a Direction on the council in March 2020 to progress the *Local Plan 2034* through the examination process to adoption by December 2020.

During the year, 1300 new homes have been built in the district, compared to 1,326 in 2019/20; completion of affordable homes is down in 2020/1 to 217 compared to 517 in 2019/20

Going forward, South Oxfordshire have agreed to develop a future joint Local Plan for the area to reduce costs and help the councils' meet their ambitious targets for making the two districts carbon neutral.

Local Plans are used to help determine planning applications and set out how and where new housing developments should take place, along with identifying the infrastructure needed to support them. They also set out policies on what kind of housing is appropriate and acceptable; what the local requirements for affordable housing are; and can even set requirements on the energy-efficiency levels of new developments.

Both councils have committed to do everything they can to address the climate and ecological emergency, and officers advised that the consensus on these issues makes this a rare opportunity to create a joint Local Plan.

The advantages include the planning issues in the two districts are quite similar, like the need for carbon reduction, affordable housing and new and improved infrastructure, and so a joint plan would be able to address these issues in a co-ordinated way.

There will also be cost savings by producing one plan for both districts because there would be one set of evidence studies, one local plan examination and one Planning Inspector not two.

After the first two years we have seen good progress towards the targets in all parts of the Oxfordshire Housing and Growth Deal, though the COVID-19 pandemic is

having a significant impact on growth and development which prompted a review of all areas of activity. It is still anticipated that the Oxford to Cambridge Arc will be a major government focus for economic recovery.

In March 2021, South Oxfordshire building control service were awarded the quality mark ISO 9001 for their provision of public sector building control and public protection services.

Building control is a service that checks that structures and buildings are constructed or modified to meet Building Regulations standards to make sure that the minimum standards to protect people's safety, health and welfare in and around buildings can be achieved.

An important part of their work is to help improve energy efficiency, protect and enhance the environment and promote sustainable development.

This quality mark is a fantastic achievement for our building control team and demonstrates our commitment to providing a quality service for residents. Ensuring the safety of all building work, whether on our homes, public buildings or commercial properties is a vital role for the communities we serve.

Our Planning Service are also reviewing our adopted design guide (2016). This will help further improve the quality of new development and to mitigate climate change. The Climate Emergency Advisory Committee are involved in this project and have provided some recommendations to officers.

We have done this by proactively engaging with customers at the earliest point and through positive partnerships with other agencies. These include Citizens Advice Bureau and Connection Floating Support, who provide debt and welfare advice to enable customers to remain in their own homes. We also use Enhanced Housing Options – an online assessment tool to help customers address their housing issues. Customers who do not have access to a computer are able to telephone a member of the housing team who will guide them through the process.

As of 31 March 2021 we had 4 households in emergency temporary accommodation; the rolling six-month average of households in emergency temporary accommodation was 5.7. The rolling six-month average length of stay for households in emergency temporary accommodation was 50 days compared to a central government ceiling target of 42 days.

We have also made good progress on developing our council homes delivery vehicle and have undertaken an appraisal of options that sets out the specific levers and characteristics that may be available to us.

Theme 6: Investment and innovation that rebuilds our financial viability

At the time of developing the Corporate Plan 2020-24 the pandemic has cost, and lost, the council money. Many years of austerity before that, as well as a failure to increase council tax in line with growing costs, makes it hard to balance the books.

Over a number of years, the council has made significant savings through joint working, especially with our close partner the Vale of White Horse District Council, with whom we have saved costs on staffing, contracts and office accommodation.

This type of innovative joint working, along with sound financial management, has helped to keep costs down and meant that we are able to keep the cost of council tax to our residents low.

In recent years the level of council tax has been kept low, from £123 for a band 'D' property in 2011/12 to £131.24 2021/22. This is the eighth lowest of all shire district councils.

We measure a number of key income streams, to ensure that we are both maximising income and understanding early where external factors might impact on budgets. During 2020/21:

- Planning income totalled £2.13million against a budget of £1.96 million, this compared to income of £1.54 million in 2019/20.
- Land charges income totalled £315k compared to £281k in the previous year.
- Car parking income totalled £545k compared to £965k in the previous year.
- The New Homes Bonus paid to the council for 2021/22 will be £2.55million, compared to an average of £1.11 million, putting us eighteenth out of all 181 shire district councils.

Our Council Tax collection rate of 98.28 per cent put us joint 57th with two other councils when ranked against all 188 shire district councils existing at end March 2020 (the latest national data available).

The development of our innovative Transformation Strategy will diversify our revenue streams, improve effectiveness and secure our on-going viability. We are exploring scope for improved IT systems including for finance, accounting and payment solutions. These will improve efficiencies, leverage digital opportunities and meet requirements for modern government and planning processes. Our ResolvIS project will provide further automation of the revenues & benefits service and greater self-service for customers and improve operational efficiency and user experience. We are also exploring new revenue streams including for renewable energy and other land projects, such as exploring revenue generation opportunities from a Wind Solar Farm.

The councils new corporate focus on securing external funding will be implemented through the further development of our External Funding Framework. This framework builds on our track record of partnership working to successfully secure external funding such as the £218 million of Housing Infrastructure Funding (HIF) which is being used to improve local transport links.

Our Strategic Property Review, development of an enhanced property and asset records and databases, along with our One Public Estate project will embed strong stewardship of all council assets including property and financial investments. The Strategic Property Review has taken longer than anticipated as our surveyors have been reviewing all of our assets thoroughly and also looking for any opportunities for environmental upgrades.

We are also developing a new Procurement Strategy which will provide additional opportunities for savings and efficiencies. This will be reviewed by Cabinet in the Summer.

This report presents an interim summary of actions towards the priorities in the Corporate Plan 2020-24.

Cabinet Report



Listening Learning Leading

Report of Head of Corporate Services

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Date: 10 June 2021

Councillor Community Grant Scheme

Recommendation

That Cabinet approves the revised policy for adopting a ward-based approach for awarding councillor grants, attached at appendix one.

Purpose of Report

1. To seek Cabinet approval to revise the Councillor Community Grant Policy to; introduce a ward-based approach to funding projects that, meet the needs of the council and organisations seeking funding, along with addressing some issues encountered from previous round/s.

Corporate Objectives

2. Through offering financial support to community projects that align with our corporate priorities, the Councillor Community Grant Policy contributes to the following priorities:
 - Protect and restore our natural world
 - Action on the climate emergency
 - Improved economic and community well-being
 - Homes and infrastructure that meets local need

It also supports our equality objectives through funding projects that deliver better outcomes for disadvantaged groups and encourage community cohesion.

Background

3. The council has for many years been in a very fortunate position to provide significant funding towards improving community facilities and activities, the environment and the health and well-being of our residents. The community grants portfolio currently includes budgets for three grant schemes: Revenue (£333,996), Capital (£320,000) and Councillor Community Grants (£180,000).
4. The aim of the Councillor Community Grant scheme is to fund community projects and initiatives that will deliver better outcomes for South Oxfordshire residents as well as contributing to the achievement of the council's Corporate plan priorities. There is a budget of £180,000 available in 2021/22 to run this scheme.
5. Following a review of the scheme to ensure it still meets the needs of the council and those seeking funding for community projects the proposed policy includes a number of improvements to the existing one, which include:

- a) Moving to a ward-based approach for determining applications for funding where applicants would submit a single application for the relevant ward councillor/s to consider. This would facilitate the pooling of funds to support more expensive projects that could have a greater impact within the community.

The funding allocation would remain as it currently does so £5,000 for each ward member but pooled in multi member wards. The scheme would open with the full budget allocation for each ward, offering a second round with any remaining funds.

This would mean increasing the maximum project cost for capital funding from £10,000 to £15,000.

- b) Opening the scheme from June to February (currently April to February). This would take into account the implications of local elections.
- c) Running two rounds of funding instead of one, to support easier and earlier decision making but still considering the merits of each project. Councillors would have the discretion to respond to community need by either making decisions within four weeks of receiving an eligible application or waiting until each round closes.
- d) Allowing town and parish councils, some of whom are already supporting groups directly, to apply for funding on behalf of unconstituted groups, to support partnership projects that are benefitting the local community. We have seen a real need for this during the pandemic, with informal groups wanting to do more to support their communities.
- e) Allowing not for profit preschools and PTAs for local authority run schools or Academy's, currently not eligible, to apply for non-statutory elements of the education programme.
- f) Allowing applications for one-off salary costs for pilot projects of between 3-6 months in response to a growing demand from groups for revenue funds.

- g) Introducing a minimum threshold of £150 above which the council will request any unspent funding back. Currently grant recipients are required to pay back a proportionate of the grant if the project costs less than expected, or they receive additional funding from other sources towards the project. In comparison, the Capital Grants scheme has a minimum repayment of £500.
- h) Other changes to provide more clarity on the process or eligibility include:
- a. Eligibility documents setting out the need to:
 - Provide income/expenditure/reserves for the most recent complete financial year– or projections for new organisations.
 - Demonstrate they are ‘not for profit’ and the project they are applying for matches the organisations objectives¹.
 - b. Providing clarity that we will consider applications from parish councils for activities that they have the power to deliver, but not a statutory duty to provide.
 - c. Setting out the process for dealing with conflicts of interest and pecuniary interests, when either are declared.
 - d. Setting out the process when there is an unexpected by-election.

Options

6. To continue with the status quo and operate the scheme under the existing policy. However, the council could be criticised for not responding to feedback or providing the clarity needed for effective decision making therefore this option is not recommended.
7. To implement some of the proposed policy changes set out in this paper. However, this option is not recommended, as it would reduce the ability to improve the effectiveness of the policy for the council and applicants.
8. To move to a ward-based approach, which would allow funding to be pooled to fund larger projects that have a greater impact within the relevant ward. Each round would open with their full budget allocation, with any remaining funds to be used for a second one. Splitting the budget equally for each round, would result in a greater number of smaller scale projects and is therefore not recommended.
9. Given the impact of the current pandemic on the council's financial position, as detailed in the financial implications below, a further option would be to reduce or withdraw the funding for the councillor grant scheme. This will support the Corporate Plan priority around rebuilding our financial viability. Conversely it would impact on improving economic and community wellbeing.

¹ Please note officers only request the governance and financial documents for every fifth application and any organisations who have not received council funding in the last 12 months.

Climate and ecological impact implications

10. There are no negative impacts of the proposed changes from a climate or ecological perspective. The scheme criteria supports the Corporate Plan priorities and therefore can fund projects that have positive climate and ecological benefits.

Financial Implications

11. The proposed changes to the policy would not result in any additional costs to the council. There is £180,000 in the 2021/22 budget to fund the scheme. However, the introduction of a minimum threshold for returning underspends on projects, could have a small impact on the amount of funding returned to the council's reserves. This would be offset by the saving in officer time in managing this. In the last two years we have only requested funds back from two organisations. One of which was for £1,800 the other £723. In both cases the proposed changes would not have impacted on these funds being returned.
12. Any council decision that has financial implications must be made with the knowledge of the council's overarching financial position. For South, the position reflected in the council's medium-term financial plan (MTFP) as reported to Full Council in February 2021 showed that the council is due to receive £4.3 million less in revenue funding than it plans to spend in 2021/22 (with the balance coming from reserves including unallocated New Homes Bonus).
13. This funding gap is predicted to increase to over £5 million by 2025/26. As there remains no certainty on future local government funding, following the announcement of a one-year spending review by government, and as the long-term financial consequences of the Coronavirus pandemic remain unknown, this gap could increase further. Every financial decision made needs to be cognisance of the need to eliminate this funding gap in future years.

Legal Implications

14. The proposed changes do not present any legal implications. The proposed amendments will provide better governance and clarity on the process officers will take when a declaration of interest, or pecuniary interest is declared.

Risks

15. The main risks relate to the following changes:
 - Town and parish councils may not wish to collaborate with unconstituted groups, which could lead to community tensions. Communications will be carefully managed to help ensure the risk is mitigated.
 - Some organisations may still not be eligible, despite relaxing some of the current requirements. However, we can still look at this on a case by case basis, support the organisation to get prepared for the next round and/or encourage them to collaborate with their town or parish council if they are not eligible in their own right.

Other implications

16. We have considered our public sector equality duties under the Equality Act 2010 and none of the proposed changes would have a negative impact on those protected by the Act. The policy actively encourages applications from organisations who represent minority or vulnerable groups, particularly that improve outcomes for disadvantaged groups and encourage community cohesion.
17. The criteria for the scheme makes it clear we will not fund applications that do not align with the council's equalities objectives and/or the Equality Act 2010. The standard conditions also refer to the organisations having appropriate policies in place to comply with equalities legislation.

Conclusion

18. The proposed changes to the policy will help to:

- support easier and earlier decision making
- facilitate the pooling of budgets
- encourage collaboration between town/parish councils and unconstituted groups on projects for the benefit of the community
- respond to increasing demand from groups for revenue funds
- provide greater clarity to councillors and applicants on the funding criteria
- provide great clarity to councillors on the processes we will follow for declarations of interest and when there are changes to councillors

Cabinet are asked to approve the revised councillor community grant policy, attached in appendix one.

Background Paper

- N/A

Appendix 1

Councillor Community Grant Scheme – April 2021



Listening Learning Leading

Every South Oxfordshire District Councillor has a budget of £5,000 to award to projects. The aim of the Councillor Community Grant scheme is to fund community projects and initiatives that will deliver better outcomes for South Oxfordshire residents as well as contributing to the achievement of the council's Corporate plan priorities.

Basic rules of the scheme

- Projects must benefit the communities in the councillor's ward
- The minimum grant is £250 and the maximum £5,000 for each councillor (budget permitting)
- For wards with multiple councillors, applications will be considered by all ward members together to determine funding
- The total project cost of applications for capital projects must be £15,000 or less, (revenue projects have no such maximum).
- A councillor can fund up to 100 per cent of the total cost of a project (budget permitting)
- The project must complete within 12 months of the award decision
- Any unallocated budgets at the end of the financial year will return to the council's general reserves
- The scheme will usually be open for two rounds (budget permitting)
- Councillors will make their decision within four weeks of receiving an eligible application from officers, or can hold applications until each round closes, then make their decision within four weeks

Who is eligible?

- Town/parish councils and parish meetings
- Town/parish councils can collaborate with local unconstituted groups and apply on their behalf
- Not for profit preschools and PTAs for local authority run schools or Academy's, can apply for non-statutory elements of the education programme
- Local 'not for profit' organisations, this can include a company limited by guarantee which does not distribute any surplus it makes to its member, whose primary purpose is to **benefit** the residents of South Oxfordshire who can:

- Provide with their application a copy of a recent bank statement in the name of the organisation applying (no more than two months old)
- Provide on request a copy of the organisation's detailed financial records e.g. income/expenditure/reserves for the most recent complete financial year– or projections for new organisations
- Provide on request a copy of their governing document (like a constitution, set of rules, articles of association etc) that demonstrates they are a 'not for profit organisation' and the project they are applying for matches the organisation objectives
- Confirm their organisation has named officers, members or trustees on a management committee/board.

To mitigate against any misuse of a grant or to the council's reputation from this relaxed criterion to apply for a grant, officers will request the governance and financial documents mentioned above for every fifth application, and any organisations who have not received council funding in the last 12 months.

Who is not eligible?

- Other local authorities/public sector bodies (for example Oxfordshire County Council, NHS trusts). Please note: Town/parish councils and parish meetings are eligible to apply
- Groups who raise funds on behalf of or will improve/create facilities that will predominately benefit an ineligible organisation
- Individuals (this includes making any payments to individuals on behalf of community groups)
- Profit-based businesses (private businesses)
- Political and lobbying groups
- Organisations who operate a grant scheme of their own or who budget for giving grants/donations in their annual budget. Please note: Town/parish councils and parish meetings are eligible to apply
- Nationwide organisations (except where they have a local constitution and/or local bank account. We may also make exceptions if a project clearly relates to a local hub/branch of the organisation)

What kind of work/services can we fund?

We will fund projects that deliver better outcomes for South Oxfordshire residents as well as contributing to the achievement of the council's Corporate plan priorities (2020-2024):

- protect and restore our natural world
- action on the climate emergency
- improved economic and community well-being
- homes and infrastructure that meets local need.

Applications should focus on projects that deliver a clear and demonstrable **benefit** to the people and environment of South Oxfordshire, specifically in the ward of the district councillor(s) considering the request.

South Oxfordshire District Council accepts no liability or responsibility for any of the projects funded by this grant scheme or any activities that take place as a result now or in the future.

Appropriate projects could include, but are not limited to:

- Replacement equipment or improvements to community centres/halls
- Initial design/creation of a community newsletter, walking routes/tourist trails, community website or digital archive (but not ongoing publishing, maintenance or hosting costs)
- Improvements to community facilities for older people and minority groups (for example accessibility improvements and hearing loops)
- Buying and installing community play and exercise equipment
- Buying equipment the community can use like anti-flooding equipment, marquees/gazebos, defibrillators, equipment banks or IT equipment. (All equipment must remain the property of the organisation funded)
- Community festivals and event costs, subject to government guidance regarding COVID-19 - [https://www.gov.uk/coronavirus \(organisations must present the council with a plan on request for how they will manage their event in a COVID safe way\)](https://www.gov.uk/coronavirus/organisations-must-present-the-council-with-a-plan-on-request-for-how-they-will-manage-their-event-in-a-covid-safe-way)
- Initiatives to improve the energy efficiency of community buildings, for example of a community centre/hall
- Energy audits
- Improvement of sporting facilities or activities to encourage healthy communities
- Sustainability projects to protect and restore our natural world, such as tree planting projects (with the appropriate permissions in place) or improving biodiversity within your community
- Initiatives to reduce rural loneliness and isolation
- Volunteer training costs, or specialist equipment, that would enable more volunteers help or take on more responsibilities within an organisation
- Personal protective equipment (PPE) for groups (not individuals) to meet the requirements for a community initiative e.g. COVID response
- To support extra circular mental health activities for students and environmental education projects (e.g. forest schools, outdoor planting).
- To purchase equipment for preschools e.g. cycle racks, a defibrillator
- One-off hire costs (for example, excavator hire for a project or coach hire for a specific, one-off trip)
- One-off revenue costs, like feasibility studies, consultancy fees and seed funding for new organisations. Please note we will not fund costs that relate to other council services e.g. planning applications or building regulation fees

- One-off major repairs, like repairing a section of flat roof or major boiler repairs (but not routine servicing) to community buildings

Applicants must make sure they have all necessary permissions in place **before** applying for funding including planning, listed building, licensing, landlords etc.

The council is committed to promoting equality and diversity and welcomes applications from all sectors of the community, regardless of race, gender, disability, sexual orientation, age, status, religion or belief.

What we will not fund?

- Retrospective funding for work/projects that will complete before our decision is made (We will consider projects that have started; however, we will not be able to fund any retrospective costs.)
- Projects that do not demonstrate a clear benefit to the community in which they are taking place
- Statutory activities/requirements that either the council or another public-sector organisation is responsible for delivering, such as schools, public highways, public rights of way and road safety measures. We will consider activities that a parish council has the powers to deliver, but not a statutory duty to provide
- Recurring revenue costs, like salaries, rent, rates and maintenance (like boiler servicing). We will consider salaries for a one off pilot projects – lasting no longer than 3-6 months.
- Costs that relate to other council services e.g. planning applications or building regulation fees
- Ongoing or regular hire fees (for example, weekly hire of a cricket pitch roller or regular hire/lease of vehicles for a community transport scheme)
- Alcoholic refreshments
- Clothing, including uniforms and sports kit
- Projects that specifically benefit private businesses
- Political activities, lobbying or campaigning
- Projects that don't align with the council's equalities objectives and/or the Equality Act 2010.

Opening and closing dates

The scheme will usually open in June and will have two rounds (budget permitting) the second of which will close in February each year. We will publicise the dates on our website.

In the event there is an unexpected by-election for a district councillor, we will hold any new applications for that vacancy during the pre-election period (as long as the scheme will still be open when the post is filled). If not, applications will be considered (along with any still in progress) by the next elected ward member in the area the project benefits. If

there is only one councillor in the ward, then the Cabinet member will consider the application (s). In these instances, the decision may not be made in 4 weeks.

Application and Award Process

1. Organisations apply using the council's online grants management system ('the system'), accessible from our website www.southoxon.gov.uk/grants. They will select all the wards they wish to apply to when completing their application. Applicants should read the guidance notes on our website before completing an application.
2. Council officers will check the eligibility of the application (including the additional checks if required) and liaise with the applicant, if necessary, to establish eligibility.

If eligible, officers will prepare a short summary of the application for the councillors including key information from the application, concerns and any recommended payment terms and/or special conditions and send it to the councillor's southoxon.gov.uk email address.

If an application is not eligible the community enablement team will discuss the issues with the applicant (if they can be resolved) and return the application to them for resubmission once the issues are resolved. Please note, we can only do this whilst the scheme is open. If the issues cannot be overcome, they will reject the application on eligibility grounds. They will also notify the ward councillors of the reasons why any applications that aren't eligible could not go forward.

3. The district councillor/s will review the summary provided by the community enablement team, and if appropriate (multi member wards), will discuss with the other ward members, to make a decision.
4. Councillors will reply to grants@southandvale.gov.uk using their official council email address confirming:
 - their award decision
 - the reasons behind the decision
 - any pecuniary interests relating to the application – see process below
 - any other conflicts of interests relating to the application – see process below

The councillor/s can request additional information (via the community enablement team) before making their decision if necessary.

Applications can only be considered for the amount requested by the applicant and not based on the remaining ward budget available.

5. Once the community enablement team receive the councillor's decision by email, they will save it on the grants system, publish the decision on the council's website (in summary once the scheme closes) and either;
 - a. send a grant offer letter to the applicant that will include our standard (and any special) conditions and a grant acceptance form they must complete and return
 - b. inform the applicant that they were unsuccessful.

6. The applicant must sign and return the acceptance form to the community enablement team, confirming they will meet all our conditions and give the bank details for their organisation.
7. On receipt of the acceptance form the community enablement team will release the grant payment in line with the offer letter, following agreement from the relevant head of service. **All payments must be made by BACs to an account in the name of the organisation making the grant application.**

Process for dealing with conflicts of interest and changes to councillors

Declaration of interest	When a declaration of interest is declared, officers will consult the service manager and if necessary, the section 151 officer and monitoring officer. If as a result a conflict is confirmed, and there is no other ward councillor who could fund the project, the council will not be able to determine the application. In multi councillor wards, the councillor declaring a conflict of interest, would not take part in the decision making.
Pecuniary interests	When a pecuniary interest is declared, officers will consult the section 151 officer and monitoring officer. If confirmed, and there is no other ward councillor who could fund the project, the council will not be able to determine the application. In multi councillor wards, the councillor declaring the pecuniary interest, would not take part in the decision making.
Changes to funding requests, when the original councillor is no longer in post	Will be considered by the Community Enablement team in line with the policy in consultation with the head of service and/or Cabinet member

Standard conditions

- The organisation must spend the grant on the project listed in their application and within 12 months from the decision to award a grant or they will return the funding
- If requested, the organisation will return a proportionate amount of the grant if the project costs less than expected or they receive additional funding towards the project. The minimum request will be £150.
- The funding is non-transferrable unless agreed by the council in writing in advance of any spending. Any unspent funds will be returned to the council upon request. The minimum request will be £150.
- The organisation will comply with all relevant statutes and regulations related to its status, objectives and delivery of its core activities
- The organisation must have appropriate policies in place to safeguard children, young people and vulnerable adults, and comply with equalities, GDPR, COVID safety, and any other relevant legislation.

- The organisation must consult the community enablement team before making significant changes to the project/work covered by the grant and officers will confirm with the councillor(s) that they agree to these changes before responding to the applicant.
- The organisation will acknowledge the council's support in any press, publicity or promotion of the project.
- The organisation acknowledges the council accepts no responsibility or liability for this project or the facilities it provides now or in the future.

Monitoring the grants

- The grants system will record all applications, decisions and remaining balances. We will publish grants awarded on the council's website.
- The community enablement team will monitor every grant awarded to ensure spending is appropriate.
- If the awarded project has not started by the expiry date (12 months from the award date) and is unlikely to do so in the next three months, the organisation must repay the grant in full to the council. If the project has started but is not complete the councillor(s) can, at their discretion allow a single, three-month extension to the grant, by which time work/spending must be completed.
- If the project experiences delays due to COVID, organisations can request in writing a limited extension which will need to be approved by the Head of Service.
- All grant repayments will return to the council's general reserves.
- Any councillor budget not awarded by 31 March will return to the council's general reserves as carry forwards are not be allowed.
- If repayments are necessary, the community enablement team will liaise with the organisation to recover the funds, keeping the relevant ward councillor informed.
- Future applications to the councillor grant scheme could be at risk if organisations have not completed and submitted the project monitoring form.

For more information about the scheme, advice on potential projects and other possible funding sources please contact the community enablement team on or 01235 422405 or grants@southandvale.gov.uk.

Cabinet Report



Listening Learning Leading

Report of Head of Corporate Services

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Date: 10 June 2021

Capital Grants

Recommendations

- (a) Cabinet approve changes to the revised capital grants policy, adopting a thematic approach to improve outcomes for communities, attached at appendix one.
- (b) Cabinet delegates authority to the relevant head of service in consultation with the relevant cabinet member to make amendments to the current scoring criteria.

Purpose of the report

1. To seek Cabinet to approval to revise the capital grants policy adopting a thematic approach to awarding grants to improve outcomes for communities.

Corporate Objectives

2. The South Capital Grants support the Corporate Plan priority to enhance community wellbeing through giving capital grants to community groups working to strengthen cohesion, reduce social isolation and tackle areas of deprivation.

Background

3. The Council's community grants portfolio currently includes three schemes: Revenue (£333,996), Capital (£320,000) and Councillor Community Grants (£180,000).

4. The Community Enablement Team manages the capital grants scheme, which has been running for many years, awarding over £5m since 2013/2014 to create and enhance community facilities in the district.
5. The basic rules of the scheme are detailed in the policy included in the background papers. Applications are received through our online grants system, assessed against eligibility criteria, and scored against different categories (including community benefit, finance and whether the funding would enable additional facilities/activities).
6. Depending on an application's score, the project will fall into a high, medium or low priority category and funding is allocated accordingly in line with the policy. Those scoring in the top category will receive up to 100 per cent of their requested funding, medium priority projects will receive 50-75 per cent. Low priority projects will not receive a grant. The value of the grant also depends on the total budget available for the scheme and on the number of applications received falling into the higher categories.
7. The grant scheme is a valued resource for community groups. In the past four years, 71 different organisations have benefited from the scheme, including 24 town and parish councils. Project themes as grouped below;
 - 29 per cent to improve village halls and community centres
 - 28 per cent for sports clubs and facilities
 - 16 per cent for playgrounds
 - 8 per cent to churches and church run community facilities
8. The grants have typically funded refurbishment projects (33 per cent of all projects over the last four years), playgrounds (18 per cent) and sports equipment (15 per cent). New builds/extensions account for 13 per cent.

Voluntary and community sector post COVID

9. The role of the Voluntary and Community Sector (VCS) has been recognised as invaluable throughout the pandemic and will continue to be so on the road to recovery.
10. The pandemic has also brought significant, additional challenges for the VCS. The forced closure of most face-to-face activities this year (including many community facilities such as sports and village halls) has meant that traditional sources of revenue have been dramatically reduced, resulting in drastic reductions in income across the sector. Some of this income has been replaced by government business grants, costs have been managed through furloughing staff or bringing activities online, and organisations have adapted their fundraising efforts to include more digital fundraising or COVID specific grant funding where appropriate.
11. Many external (non-council) grant funders that have previously funded capital projects have either paused their grant giving or refocused their criteria to reflect changing needs which support COVID response and recovery e.g. Sport England. This has had an impact on organisations' ability to raise the sums needed to fund large-scale projects, therefore some projects have paused plans for development, while others have had to scale down.

12. Organisations have also needed to use savings in lieu of earned income over lockdown to cover basic costs such as essential repairs or maintenance to enable them to open again after lockdown, or improve their facilities to meet accessibility guidelines, COVID-19 legislation, and social distancing.
13. It is currently unclear how COVID will continue to impact the funding priorities for the VCS, and how grant makers will respond. The next one-two years are set to be even more challenging as the longer-term implications and economic impact of COVID becomes clearer. The NCVO's (National Council for Voluntary Organisations) COVID-19 Voluntary Sector Impact Barometer for organisations in the South East suggests 69 per cent of respondents expect COVID-19 to have a moderate or significant negative impact on delivering their objectives next year.
14. Officers therefore anticipate that this funding scheme will be in high demand as a valuable source of funding for the sector and therefore changes need to reflect the changing needs of organisations in this uncertain time.

A look back at 2019/2020 funding round

15. In addition to the increased challenges faced by organisations and the communities they represent; the capital grant scheme saw a significant shift in demand and expectations when it last opened to applications in 2019/2020. There was no round in 2020/2021 due to the pandemic, which also delayed the planned councillor-led transformation review of the service.
16. Demand continues to be high, with organisations keen to secure council support for their capital projects. The 2021/2022 budget is set at £320,000.

Column1	South Capital 16/17	South Capital 2017/18	South Capital 2018/19	South Capital 2019/20
Applications funded	25	19	24	11
Eligible projects not funded at panel	0	1	0	8
Average total project cost	£97,428.66	£91,255.53	£78,819.50	£125,625.27
Average grant requested	£45,032.29	£40,471.89	£37,374.33	£37,603.91
Total value of grants requested	£1,125,807	£768,966	£896,984	£413,643
Total value of grants awarded	£997,174	£715,408	£821,688	£319,317
Average grant awarded	£39,886.96	£37,653.05	£34,237.00	£29,028.82
Average % of total project cost funded	46%	44%	42%	29%
% funded of total grant requested	93%	95%	88%	77%

17. The last round of funding in 2019/2020 saw unprecedented competition for funds:
- The number of projects we could fund reduced from 25 in 2016/17 down to 11 in 2019/20.
 - Council funding used to account for 42-46 per cent of the total cost of a project. We're now funding 29 per cent of the total budget, leaving organisations with a greater financial liability where they have to find funding from elsewhere.
 - This concern that organisations still had a large fundraising liability meant that the grants panel had tough decisions to make in order to fund projects more likely to be seen through to completion to benefit our communities. Which unfortunately resulted in eight eligible projects not awarded funding. Organisations were strongly

encouraged to seek additional funding from elsewhere before applying again to the council.

18. Additional scoring criteria was also introduced in 2019/2020 to reward and encourage capital projects that contributed positively to the council's climate emergency. The majority of projects did not score highly in this area, which resulted in fewer projects being categorised as 'high priority' for funding and therefore few were eligible for 100 per cent of their requested amount.
19. There was no 2020/2021 funding round due to the pandemic, which also delayed the planned councillor-led transformation review of the service.
20. Before announcing a new capital grant scheme, we need to consider different options for improving the policy and process for applicants, officers and decision makers to ensure the scheme is fit for purpose and meets current needs within the community.

Options and Risks

A. Move to a thematic focus for the existing capital grant scheme that better supports communities' needs

21. This recommended option aims to refocus the current scheme by delivering the promises made in the council's 2020-2024 corporate plan, supporting all the outward facing themes: 'Protect and Restore our Natural World', 'Action on the climate emergency', 'Improved economic and community well-being', and 'Homes and infrastructure that meet local needs'.
22. Adapting the existing scheme using a thematic approach and updating the scoring criteria will enable officers to launch quickly to help meet the immediate needs of communities.
23. It would also offer greater support to projects aimed at improving community well-being and resilience to recover from the pandemic as well as providing new activities or facilities. A broad range of different activities will continue to be encouraged, with an emphasis on projects that can clearly demonstrate how the council's capital investment will help us deliver on our Corporate Plan priorities and better outcomes for communities.
24. Organisations will also need to show, where appropriate, that they are responding to the climate emergency. This could be acknowledging work already achieved or included in their current project plans.
25. To support decision makers to compare like-for-like projects, officers recommend that applications are submitted under a specific theme linked to the communities' needs and aspirations, as identified in the corporate plan. Projects would continue be scored against a range of cross-cutting areas which demonstrate specific outcomes or common areas (climate action, accessibility and inclusion, community benefit/wellbeing, financial sustainability), as well as category specific criteria relevant to the theme as identified in paragraph 21.
26. The high priority/top scoring projects under each theme e.g. action on climate emergency would be awarded up to 100 per cent of their requested amount, max £75,000 or 50 per cent of total project cost. Budget permitting, the grants panel would then allocate the remaining the remaining funds to medium priority projects.

27. A further option could be to split the £320,000 budget equally between all priorities to score and award projects contributing to each one or to focus on one priority each time the scheme opens. The latter would however set an expectation that funding would be available in future rounds but would mean organisations could plan ahead and be prepared.
28. By splitting the budget between the priorities or focusing on one each year we would encourage a wider variety of applications to come forward that contribute to our priorities, as historically the vast majority of projects we've funded have fallen into just two - Improved economic and community well-being, and Homes and infrastructure that meet local needs. However, this sub option is not recommended, in favour of applications being submitted and scored under a specific corporate priority themes (paras 21-26).
29. As with Option B, we expect the scheme to continue to be highly competitive and therefore unlikely we would be able to fund all eligible projects. However, we can mitigate against the reputational risk by ensuring all applicants are fully aware of the council's policy and scoring criteria.

B. Keep existing capital grant scheme policy, including minor alternations.

30. With impact of COVID-19 still uncertain, keeping the scheme as it is will allow for a broad range of eligible projects and organisations to apply.
31. Taking on board feedback from the previous rounds the scoring criteria, including scores for energy efficiency, would need to be reviewed to ensure a level playing field for organisations, particularly projects improving accessibility and/or sporting facilities, where carbon reduction is less relevant or perhaps have already integrated energy efficiency measures into their work, to have an equal chance of success.
32. Recognising the need to balance the available budget for this round of funding and the need for community groups to prioritise repair and maintenance work on their community facilities this year, we suggest changing the emphasis of the scoring criteria which currently favours projects that bring 'new' activities and facilities.
33. As with option A, we would be able to update the scoring criteria and launch quickly. However, it wouldn't be possible to compare like-for-like projects, therefore harder to demonstrate the impact the scheme has on delivering our priorities.
34. The capital grant scheme saw a significant shift in demand and expectations when it last opened to applications in 2019/2020. In light of this, guidance for applicants needs to reflect both the high level of competition for funds, and equally, set an expectation that the majority of funding needs to be in place, to ensure that the work is able to start quickly for the immediate benefit of the community.
35. The reputational risk of turning projects down for funding can be partly mitigated by ensuring all applicants are fully aware of the council's policy and scoring criteria.

C. Establish a new capital grant scheme, prioritising carbon reduction projects

36. This grant scheme would actively promote carbon reduction within communities. This could be done through a general scheme to support sustainability, energy efficiency, and biodiversity in the district, or through a scheme which mirrors current public sector

decarbonisation funding. The latter fund focuses on replacing heating systems in public sector buildings with low carbon technology.

37. Other Oxfordshire based funding that is available to organisations for 'green' projects includes Trust for Oxfordshire's Environment, however they have recently cut the funding for energy efficiency and prioritised protecting and restoring the natural environment. Energy efficiency funding is also available from OxFutures, run by the Low Carbon Hub, however while not-for-profit organisations are eligible, sports facilities and other public facilities, such as village halls are not. There is, therefore, an opportunity to offer this kind of funding to support the council's climate agenda.
38. Whilst it is important to support organisations to improve their energy efficiency and make a positive contribution to the council's climate emergency, given the need to support organisations' recovery from the current pandemic, it may not be the right time to launch a scheme that specifically supports one corporate priority. Furthermore, through the other options we would still be able to support organisations to achieve carbon reduction through their projects.
39. Developing a new scheme such as this will take longer to develop an effective policy and scoring criteria, further risking delay in launching a new round of funding.

D. Reduce budget or withdraw funding for a capital grants scheme

40. Given the impact of the current pandemic on the council's financial position, as set out in the financial implications below, we should also recognise a further option of reducing or withdrawing funding for a capital grants scheme. This will support the Corporate Plan priority of investment and innovation that rebuilds our financial viability. Equally, this option would impact on delivering against the other four corporate plan priorities listed in this report.
41. Other funds are available for community infrastructure projects through CIL/S106, however, experience has shown that often groups applying for grants through the South Capital grants scheme are unable to access CIL/S106 monies, as; they are not available in the project location, funds are already designated for other uses, or, the nature of the work needed does not meet the criteria.

Climate and ecological impact implications

42. The South Capital grant scheme will contribute to the council's climate emergency in a positive way, providing funding for projects that have the potential to reduce net carbon emissions and protect and restore the district's natural environment. Whichever funding option is favoured by Cabinet, there is an opportunity for the Climate Action team to work alongside community groups to help build capacity to incorporate energy efficient measures in their project plans.

Financial Implications

43. An annual budget of £320,000 is included in the MTFP for the next five years (up to 2025/26). Budgets are reviewed every year and may be reduced or deleted from the MTFP in future years. This should be taken into consideration should Cabinet consider an option which prioritises certain Corporate Plan themes this year. For comparison, West Oxfordshire's Community grants fund is £300,000 in 2021/2022.

44. Any council decision that has financial implications must be made with the knowledge of the council's overarching financial position. For South, the position reflected in the council's medium-term financial plan (MTFP) as reported to Full Council in February 2021 showed that the council is due to receive £4.3 million less in revenue funding than it plans to spend in 2021/2022 (with the balance coming from reserves including unallocated New Homes Bonus).
45. This funding gap is predicted to increase to over £5 million by 2025/26. As there remains no certainty on future local government funding, following the announcement of a one-year spending review by government, and as the long-term financial consequences of the Coronavirus pandemic remain unknown, this gap could increase further. Every financial decision made needs to be cognisance of the need to eliminate this funding gap in future years.

Legal Implications

46. Officers do not envisage additional legal implications of any of the options presented in this paper. All applicants have to sign up to terms and conditions as a requirement of council funding. These will be reviewed to ensure they are appropriate for any remodelled scheme.

Conclusion

47. The South Capital Grant Scheme is an invaluable resource for the voluntary and community sector in South Oxfordshire and competition for funds is likely to continue to be a challenge for both applicants and decision makers in the coming years.
48. In previous rounds, the most frequently funded projects include playgrounds, refurbishment of community buildings, and updated sports facilities and equipment. Future funding rounds are likely to attract similar activities, with potentially more of an emphasis on improving and extending existing facilities, rather than providing new large-scale capital projects as a result of the pandemic and the impact this has had on fundraising.
49. Cabinet is asked to approve changes to the capital grants policy, attached in appendix one, adopting a thematic approach to improve outcomes for communities. This would allow the scheme to be responsive to the immediate needs of the community, however, as we have seen in the 2019/2020 funding round, competition is likely to remain high.
50. Cabinet is also asked to delegate authority to the relevant head of service in consultation with the relevant cabinet member to make amendments to the scoring criteria to reflect the change in approach.

Appendix 1

Capital Grants (CG) Policy

(REVISED MAY 2021)



Introduction

The council provide grants to voluntary and community organisations to help build thriving communities and improve the quality of life for the residents of South Oxfordshire, through projects that; improve economic and community well-being, provides infrastructure that meets local need, that protect and restore our natural world; and take action on the climate emergency.

Applicants apply online through the council's website, where the full guidance is available to help the applicant submit the best possible application.

What type of project will the scheme fund?

This fund is for projects that support the following council's Corporate Plan priorities (2020-2024); to protect and restore our natural world; action on the climate emergency, improved economic and community well-being and homes and infrastructure that meets local need.

They must take place in the district or within a three-mile radius of the district boundary and be able to demonstrate significant numbers of South Oxfordshire residents will benefit, or that the project that will improve outcomes for disadvantaged groups and will contribute towards at least one of the council Corporate Plan priorities for 2020-2024. Submitting their application under a specific theme.

We will only fund capital expenditure (excluding vehicles) from this scheme like buying, building, replacing or making improvements to long term assets (buildings, play areas and equipment). To us a long-term asset must have a life of at least five years for a grant of up to £25,000 and ten years for grants over £25,000. It must remain the property of the organisation we are funding for the requisite 5 or 10 year term.

This is a highly competitive grant scheme and the council receives applications from many excellent and worthy projects. Therefore, it's not always possible to fund every eligible application or award the full grant that is requested. We would advise applicants to have a thorough fundraising plan with contingencies in place.

We won't give grants towards loans, mortgages and revenue costs like maintenance, rent, clothing or salaries. We can award grants for certain repairs, but it depends on the scale and nature of them, so we suggest contacting the community enablement team communityenablement@southandvale.gov.uk before applying.

We will only accept applications for work/projects that won't complete before our decision is made. However, we will consider projects that have started; but cannot fund any retrospective costs.

Organisations cannot apply to this scheme for projects we have awarded grants to before.

Who can apply to the scheme?

- Town & Parish Councils
- Non-profit businesses & Community Interest Companies
- Community based organisations

Organisations will need to be able to provide a copy of their constitution or equivalent governing documents.

We are committed to promoting equality and diversity, and welcome applications from organisations who represent minority or vulnerable groups.

Who is not eligible?

- Other local authorities/public sector bodies (for example Oxfordshire County Council, NHS trusts)
- Organisations that are funded by public sector/statutory bodies (for example Schools, GP practices)
- Groups who raise funds on behalf of or will improve/create facilities that will predominately benefit an ineligible organisation (for example PTA's delivering projects to benefit their school)
- Projects that usually fall to other public sector/statutory bodies to provide, or will primarily benefit organisations under their remit
- Individuals (this includes making any payments to individuals on behalf of community groups)
- Profit-based businesses
- Projects for residential buildings

What are the minimum and maximum amounts for the scheme?

Organisations can request a minimum of £1,000 and up to 50 per cent of their total project costs. In exceptional cases, like a major funder pulling out of a project that offers significant benefit to our residents we may consider a request for more than 50 per cent.

To request an exceptional amount, applicants must get approval from us (via the community enablement team) before submitting an application.

We will not award more than the amount requested.

The maximum an applicant can request is the budget available for each round of applications up to a maximum amount of £75,000 per application, which will be published on the council's website before and after each round of awards. However, we are very unlikely to commit all of the available funding to a single project.

We award our grants as a percentage of the total project costs. If a project ends up costing less than expected we will pay the awarded percentage of the final cost, however if it costs more, we limit our award to the maximum amount agreed.

Opening and closing dates

We will usually open for applications twice each financial year (if there is enough budget available). Except in the financial year during which a district council election is held, when we may only open once. We publish the opening and closing dates on our website.

We will open each round of funding for a minimum of six weeks and subject to committee deadlines will usually make decisions within 12-14 weeks of the closing date.

Scheme eligibility criteria

In addition to meeting the requirements above, applicants must provide:

- a copy of the latest statements for any bank/building society accounts in the name of the organisation, as identified in the application and on their constitution
- two quotes for the project or a professional estimate for any building work for projects under £10,000 and three quotes for over £10,000
- a breakdown of the budget for the project including all the sources of funding
- a constitution that demonstrates that the project they are applying for matches the organisation objectives. They are a 'not for profit organisation' and the trustees don't receive benefits. (except parish or town councils, churches or similar organisations that are governed by a central body and therefore don't have their own constitution).

And must confirm:

- they sign up to our standard terms and conditions before proceeding with the application. These are available to download from the website and grants system
- organisations have the correct authority in place for their representatives to apply and enter into the Grant Agreement and legally bind the organisation. Parochial Church Councils and parish councils have own governing arrangements for this, which should be followed
- the project won't complete before a decision has been made, which is usually 12 - 14 weeks from the closing date, as we cannot pay for retrospective costs
- they have all the necessary consents such as planning permission, listed building consent, Diocese faculty, landlord or Head lease consent, compliance with any restrictions on the property title etc. and could provide these on request. Please note, we cannot fund planning permission and building regulations.
- they will provide additional information to help us evaluate their application on request.

Applicants requesting more than £10,000 must also provide:

- copies of any necessary planning, listed building, Diocese faculty, landlord or Head lease consent, compliance with any restrictions on the property title and other relevant permissions

- their most recent financial accounts or their working budget and financial plan for the year if they're a new organisation. Parish Councils are required to submit their full accounts.
- a project plan including ongoing maintenance arrangements.

Applicants requesting over £25,000 must also provide:

- evidence of ownership of the property, interest in the property, or a lease with at least ten years remaining, including a copy of the Land Registry title register and plan of no more than 3 months old. If the property is leased, or the Land Registry documents show another organisation has a claim on the title, please provide valid permission for the works from the third party (freeholder) / landlord.

The head of service for community enablement can decide to accept applications that don't meet all the above criteria and will do this on a case by case basis. Applicants must give clear reasons why they can't meet a particular criteria for us to consider an exception. Organisations must formally accept the grant offer within four weeks of the date of offer letter otherwise the offer will be withdrawn.

Projects awarded up to £25,000 must complete within 12 months from accepting the offer. Projects awarded over £25,000 must start work within 12 months of accepting the offer and must complete within 24 months.

If there's any unexpected delays to the project, applicants can request one extension of up to 12 months, giving the reasons for the delay. We must receive these requests at least one month before the end of the original grant term.

We will send reminders for unclaimed grants three months before they expire for projects that have not started within the specified timescale. We will return any unclaimed awards after the expiry date to the council's general reserves or make the funds available for the next round.

Decision making

COMMUNITY ENABLEMENT TEAM

The community enablement team will review the eligibility of every application before using the scoring matrix in appendix one (to be added once approved) to suggest scores to the Community Grants Panel. Applications will be assessed per theme. They will also flag any concerns or issues for additional consideration, in order to support the panel's decision making.

HEAD OF SERVICE

In accordance with the council's constitution. The council's head of service for Community Enablement and when relevant, in consultation with the services cabinet member (using delegated powers) will decide:

- if we will accept requests for over 50 per cent of the total project cost
- if we will accept applications that don't meet all the eligibility criteria

- whether to give extensions to the term of any grant
- whether to amend award percentages beyond what was originally agreed, as requested by applicants. Increases will stay within the 50 per cent maximum limit for the scheme.

COMMUNITY GRANTS PANEL (KNOWN AS THE CG PANEL)

The CG panel considers officers suggested scores for each application under the relevant theme and makes recommendations to Cabinet for awards base on the scoring matrix at appendix one.

Competition for the fund means that not all worthy and eligible projects can receive funding in each round.

Even if an application scores enough points, the panel can recommend not funding it if they:

- have serious concerns around the management of the project now or in the future
- believe the applicant has sufficient unrestricted reserves to fund the project themselves
- have serious concerns about the appropriateness of the project or its financial viability, such as if the organisation has not demonstrated having a sound fundraising plan with contingencies should any of their grant applications (to the council and others) be unsuccessful or award less than requested.
- believe the project doesn't meet the criteria or help deliver the council's strategic objectives.

The CG panel's recommendations are then presented to Cabinet to consider and decide which grants to award.

Standard terms and conditions for all grant awards

All organisations are required to sign up to our standard terms and conditions before proceeding with the application.

We may add extra conditions to any grant if we consider it necessary. This may include the use of a charge or restriction to protect the council's funds. These conditions will be determined using a risk matrix in consultation with the Cabinet member for any projects that appear to present a medium or high risk. They will then be presented to the Community Grants Panel and Cabinet for consideration.

The head of service for community enablement has delegated authority to remove any agreed grant conditions.

We will confirm applicants have met all the conditions before making any payment. Failure to meet all the agreed conditions may delay payment or, in extreme cases, result in us withdrawing our grant offer.

Payment of grants

We will only pay towards costs incurred after the date of the council's decision to award a grant.

We pay the grants in two stages, half when we receive a valid signed acceptance form and terms and conditions. We pay the balance when the project completes, upon receipt of evidence (receipts/invoices) of expenditure. The council has the discretion to delay the first payment where it is perceived due to conditions outside the organisation control (e.g. COVID) the project start date could be delayed.

In exceptional cases like property purchases, we may make a single upfront payment, which officers may recommend as part of their evaluation. The council also has the discretion to pay in two stages, half when we receive a valid signed acceptance form and terms and conditions and half upon the confirmation of an exchange and completion date from the applicant's solicitor.

If the project costs less than expected, we will reduce our final payment accordingly and, if necessary, request back some of the first payment (the minimum amount for us to request repayment is £500).

Grants that have not been claimed within six months of the project completing will be closed and the final payment not issued if we do not hear from the applicant.

Cabinet Report



Listening Learning Leading

Report of Interim Head of Corporate Services

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To: CABINET

Date: 10 June 2021

Policy on the council's public support for socially important topics and campaigns

Recommendations

- (a) That Cabinet agrees to adopt the policy set out below.
- (b) That Cabinet agrees to incorporate dates relating to diversity and inclusion into a broader calendar of events to accompany this policy as set out in option 3 below.
- (c) That Cabinet delegates the decision to finalise the draft list of dates to the Cabinet Member for Corporate Services, subject to any final amends in consultation with other Cabinet Members.

Purpose of Report

1. To set out the rationale for the creation and adoption of a new policy that sets out how and why the council lends public support to certain socially important and campaigns.

Corporate Objectives

2. Openness and accountability

Background

3. As an organisation that represents the local community, we have a role to show leadership and solidarity on a wide range of socially important topics. This is most important on social media, where there's both expectation and scrutiny over how the council speaks on this kind of subject.

4. The priorities set out in the Corporate Plan give a good steer on a range of topics the council supports, but there is a vast – and ever-increasing – variety of relevant awareness campaigns throughout the year.
5. It is clearly not practical from a resourcing perspective to support all of them, so we need to strike the right balance between communications about council services and communications aimed at raising awareness.
6. Identifying which social topics the council would publicly support, to what degree, and how much resource to put behind it, has historically fallen exclusively to communications officers.
7. This historic approach exposes the council to reputational risk, particularly given the increasingly critical environment on social media, where councils are under greater scrutiny for what they say and do.
8. It has therefore become increasingly important to have an adopted policy in place that sets out how the council uses its corporate social media accounts and other communications channels to publicly support socially important topics.
9. The policy would include an annual calendar of events that the council would support, along with a procedure for how to adapt and update that calendar on an ongoing basis to ensure the council has the flexibility to adapt to breaking news and changing situations.
10. On a related note, Cabinet members have expressed their wish for the council to have a Diversity Calendar to demonstrate its commitment to diversity and inclusivity in the districts.
11. Other councils' Diversity Calendars are a published set of dates relating to events and matters relating to diversity and inclusivity although often these don't appear to relate to any active commitment.
12. Officers therefore recommend that the calendar associated with this policy should include dates the council would publicly mark that are related to a range of religious festivals, and a variety of campaigns to support minority and marginalised members of our communities. This would serve as a diversity calendar and provide a practical way for the council to demonstrate its commitment to diversity and inclusivity in the districts. With diversity dates sitting alongside corporate priorities, the calendar could then be named appropriately in discussion with the Cabinet Member for Corporate Services.
13. The aim of the calendar of dates is to reflect our corporate priorities and the diversity within South Oxfordshire communities. The calendar would be flexible, and the policy would allow us to change and update the dates we mark to ensure we are reflecting our diverse communities now and as they change in the future. When newer data from the recent Census becomes available around the diverse make-up of our communities, the council's Equalities Officer will review the calendar to ensure it continues to reflect the diversity within our district.

Other options

14. There are some other options available for how to handle the need for a calendar to support this policy as well as a Diversity Calendar, which are set out below. Officers recommend option 3.

15. Option 1 – two separate calendars:

- a) a standalone “off the shelf” Diversity Calendar – this will cover all bases from a diversity and inclusion perspective, but we don’t have the capacity to publicly promote/support every event listed;
- b) a calendar to accompany the policy, which includes the events and campaigns we will publicly promote/support, including selected items from the Diversity Calendar.

The main benefit of this is we’d have a more comprehensive Diversity Calendar than the other options. The main drawback is that the extensive Diversity Calendar might draw attention to the fact that we’re selective about the events we have the capacity to publicly promote, which might draw criticism.

16. Option 2 – two separate calendars:

- a) a smaller, bespoke Diversity Calendar of selected items that we can commit to publicly supporting, which reflects the district’s diverse communities;
- b) and a separate, corporate priorities calendar that sets out the campaigns and events we’ll publicly support that aren’t directly related to diversity (EG Clean Air Day)

The main benefit of this approach is that it means our Diversity Calendar carries more weight than Option 1 as we’d be committed to promoting every event listed. The main drawback is that it might make the two calendars look a little sparse.

17. Option 3 –one calendar to support the policy. It would be comprised of the two calendars outlined in Option 2 combined into one. A high proportion of the events listed are likely to be related in some way to diversity so it can serve as a Diversity Calendar.

The main benefit of this approach is that it mitigates the risks of Option 1 and has all the benefits of Option 2 but none of the drawbacks. The main drawback is that some people might find it odd to include items that aren’t directly related to diversity (EG Clean Air Day) on a Diversity Calendar. This can be mitigated by including those events in a different section of the calendar, or by renaming the whole thing as the Diversity and Social Campaigns Calendar or something similar.

This is the recommended option.

Climate and ecological impact implications

18. There are no climate or ecological impact implications, but this policy does provide us with an opportunity to update and inform our residents and other customers on climate and ecological emergency work, one of the corporate plan objectives.

Financial Implications

19. There are no financial implications.

Legal Implications

20. There are no legal implications.

Risks

21. There's always a risk when publicly supporting one campaign or issue but not another, and that is heightened when publishing a calendar of dates as it draws greater attention to what we have and haven't decided to publicly support. Part of the reason for the policy to exist is to mitigate against this risk, by explaining the rationale for making the decisions and allowing flexibility for change where we might not have got it right, but there is still scope for people reviewing the calendar to be disappointed or upset with our decisions.
22. As a further mitigation against this risk, the council's Equalities Officer will be ensuring that the dates listed relating to diversity and inclusion properly reflect the make-up of the district.

Conclusion

23. Having this policy in place provides a sound and justifiable basis for the council to publicly and proudly support a wide range of events, religious festivals and socially important topics in a way that is sensitive to its residents' beliefs and opinions, and in a way that is proportionate to the rest of its external communications.
24. It will help to ensure the council is focusing the support it lends to the events and topics most aligned to the council's adopted priorities. It will also help to explain, if criticised, why it has chosen to promote one but not another.
25. This report includes a draft version of the policy and a draft list of dates to be supported.

Background Papers

None

DRAFT Policy on the council publicly supporting socially important topics and campaigns

1. This policy sets out the socially important topics, national days of celebration and other public events that South Oxfordshire District Council will publicly support through our corporate communications channels.

BACKGROUND

2. As organisations that represent the local community, residents sometimes look to us to show leadership and solidarity on local, national and international issues, particularly on social media.
3. Councils are sometimes criticised for speaking out on a subject while also being criticised by others for not speaking out enough on the same subject. This policy supports the council's position on taking a firm stance and showing leadership in this situation.
4. **Despite the challenges faced by getting involved in public debate about current affairs, it's very important for the council to show leadership on matters that are important to members of its communities.**
5. To avoid criticism for what we are and aren't taking a public position on, this policy sets out the key socially important topics, days and events we'll mark throughout the year.
6. Naturally, it wouldn't be practical to mark every topic, day or event as there are so many, and so the ones identified in this policy have been chosen in line with the council's corporate priorities.
7. While an annual calendar of events to be marked could be established in advance, the council needs to be flexible enough to adapt its procedures to react to breaking news and changing situations.

THE POLICY

Annual campaigns the council will support

1. The council will aim to provide some public support online and through other communications channels to the campaigns listed in the calendar in Appendix A (TBC).
2. The choice of communications channel and how much support the council provide will depend on a number of criteria, including: professional judgement from the Communications team on what level of support is appropriate, how high-profile the

campaign is, how long it runs for, compatibility with other communications campaigns the council is running at the time, resources, and other priorities.

The difference between corporate support and councillor support

3. This policy sets out how we will respond to socially important topics corporately using communications channels managed and co-ordinated by the Communications team like the corporate social media accounts or the official council websites, and by other teams in the council. A key objective of this work is to bring the council closer to all its communities, and to bring its communities closer together.
4. Councillors are free to use their personal social media accounts to comment on current affairs and other subjects in line with the Councillors' Code of Conduct.

Exceptions and changes to the calendar of events

5. There might sometimes be a high-profile current affairs issue that arises, which isn't included in this policy.
6. On occasions, it might be a significant enough issue to require being permanently added to the calendar. This can be achieved with written agreement from the council Leader and the Head of Corporate Services.
7. If it's an issue that just requires some one-off council support, then on request of the council Leaders and with agreement of the Head of Corporate Services, an exception can be made. The preferred method for making an exception is for Communications to draft some wording for approval by the Head of Corporate Services. Once agreed, the council Leaders can issue it on their personal accounts and/or it can be published on the council's corporate communications channels if presented as "message/statement/letter from Cllr XXXXXXXX on behalf of the district council."
8. There may be occasions it is necessary to postpone or abort plans to support any of the events in the calendar. For example, a breaking news story or a separate ongoing sensitive issue that would conflict with the messaging around a scheduled campaign, or a major event causing a capacity issue within the Communications team. In these instances, the Communications team will identify and flag any issues and, where time allows, will seek support from the Head of Corporate Services and relevant Cabinet Members.

Reviewing the calendar of dates

9. The calendar will be reviewed annually by the council's equalities officers to ensure the dates continue to reflect the council's priorities and the diversity within our district. It will also be reviewed periodically when new data about the district's demographic is published, to ensure our communities are accurately and appropriately represented.

Appendix A – Diversity and Social Campaigns Calendar [DRAFT – name TBC note that once approved, this calendar will be developed into a visually-pleasing, accessible and easy to read design]

- Third week in Jan Big Energy Saving Week
- 27 Jan International Holocaust Remembrance Day
- Late Jan/Early Feb Chinese/Lunar New Year (varies each year)
- Third week in Feb UK Race Equality Week
- 8 Mar International Women’s Day
- 18 Mar Global Recycling Day
- Third week in Mar Neurodiversity Day
- Fourth week in Mar National Workouts and Wellbeing Week
- Mar/Apr Ramadan (varies each year)
- Mar/Apr/May Eid al-Fitr (varies each year)
- Mar/Apr/May Easter (varies each year)
- Apr Stress Awareness Month
- 3 Apr Walk to Work Day
- 22 Apr Earth Day
- 8 May VE Day
- Mid May Equality, Diversity and Human Rights Week
- Third week in May Mental Health Awareness Week
- Jun Pride Month
- First week in Jun Volunteering Week
- Third week in Jun Loneliness Awareness Week
- 15-20 June Learning disabilities week
- Jun/Jul Eid al-Adha
- Fourth week in Jul National Countryside Week
- 5 Aug Cycle to work day
- 7 Sept Youth Mental Health Day
- Second week in Sept Zero Waste Week
- Third week in Sept Great British Spring Clean and Big Green Week
- Sept/Oct Yom Kippur (varies each year)
- 22 Sept World Car Free Day
- Oct Black History Month
- 8 Oct Clean Air Day
- 10 Oct World Homeless Day
- 18 Oct Anti-Slavery Day
- Second Sun in Nov Remembrance Sunday
- 11 Nov Remembrance Day
- Mid Nov Diwali (five-day festival)
- 19 Nov International Men’s Day
- Last week in Nov/First week in Dec National Tree Week
- Late Nov to late Dec Hanukkah (varies each year)
- 3 Dec International Day of persons with disabilities
- 25 Dec Christmas Day
- 31 Dec New Year’s Day