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**Friday, 20 June 2025**

**Chair: Councillor M Pringle  
Vice-Chair: Councillor N Ross**

**Members of the Committee:**

**Councillor A Brazier  
Councillor C Brooks  
Councillor A Freeman  
Councillor J Hall  
Councillor S Haynes  
Councillor R Holloway  
Councillor R Jackson**

**Councillor D Moore  
Councillor P Rainbow  
Councillor K Roberts  
Councillor M Spoors  
Councillor T Thompson  
Councillor T Wendels**

**Substitutes**

**Councillor N Allen  
Councillor D Darby  
Councillor P Harris  
Councillor S Michael  
Councillor L Tift**

MEETING:	Policy & Performance Improvement Committee
DATE:	Monday, 30 June 2025 at 6.00 pm
VENUE:	Civic Suite, Castle House, Great North Road, Newark, NG24 1BY
<p><b>You are hereby requested to attend the above Meeting to be held at the time/place and on the date mentioned above for the purpose of transacting the business on the Agenda as overleaf.</b></p> <p>If you have any queries please contact Helen Brandham on <a href="mailto:helen.brandham@newark-sherwooddc.gov.uk">helen.brandham@newark-sherwooddc.gov.uk</a>.</p>	

## **AGENDA**

### **Page Nos.**

1. Notification to those present that the meeting will be recorded and streamed online
2. Apologies for Absence
3. Declaration of Interest by Members and Officers
4. Minutes of the meeting held on 2 June 2025

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### **Reports and Presentations**

5. Attendance at Committee by Representatives of the Department for Work & Pensions

Verbal  
Report

Attendance at Committee by:  
David Williams – Partnership Manager; and  
Tracy Whelan – Senior Partnership Manager

6. Newark & Sherwood Community Lottery - Annual Report
7. Homelessness Prevention and Rough Sleeper Strategy and Delivery Plan (2024-2029) Annual Update - Year One
8. Corporate Annual Budget Strategy for 2026/27
9. Provisional Financial Outturn Report to 31 March 2025
10. Community Plan Performance for Quarter 4
11. Customer Feedback - Half Year 2 - 2024/2025
12. Presentation by the Leader of the Opposition, Cabinet Member without Portfolio

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### **Reports from Working Group**

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### **Review of Cabinet Work Programme and Recent Decisions**

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16. Provision Items for Future Agenda

Affordable Housing Annual Outturn

Annual Review – Grant Funding Outturn

Q1 Financial Forecast Outturn Performance 2025/25 and General Fund & HRA

Q1 Community Plan Performance Report

Newark Town Centre Master Plan Update

Local Government Social Care Ombudsman Annual Report

UKSPF/REPF Update

Bassetlaw and N&S CSP Progress & Performance and Review of Priorities

Attendance at Committee by Portfolio Holder for Public Protection & Community Relations

Annual Report of the Work of the PPIC

Health & Community Development Annual Update

Changes to National Recycling Policies

Annual Tenant Satisfaction Measures 2024/2025

Annual Compliance Update – Corporate Estate

Social Value Charter

## NEWARK AND SHERWOOD DISTRICT COUNCIL

Minutes of the Meeting of **Policy & Performance Improvement Committee** held in the Civic Suite, Castle House, Great North Road, Newark, NG24 1BY on Monday, 2 June 2025 at 6.00 pm.

PRESENT: Councillor M Pringle (Chair)  
Councillor N Ross (Vice-Chair)

Councillor A Brazier, Councillor C Brooks, Councillor A Freeman, Councillor J Hall, Councillor S Haynes, Councillor R Holloway, Councillor R Jackson, Councillor D Moore, Councillor P Rainbow, Councillor K Roberts, Councillor M Spoors, Councillor T Thompson and Councillor T Wendels

IN ATTENDANCE: Councillor N Allen, Councillor R Cozens, Councillor E Oldham and Councillor C Penny

### 105 DECLARATION OF INTEREST BY MEMBERS AND OFFICERS

There were no declarations of interest.

### 106 NOTIFICATION TO THOSE PRESENT THAT THE MEETING WILL BE RECORDED AND STREAMED ONLINE

The Chair advised that the meeting was being recorded and live streamed from Castle House.

### 107 MINUTES OF THE MEETING HELD ON 14 APRIL 2025

The minutes from the meeting held on 14 April 2025 were agreed as a correct record and signed by the Chair.

The Chair advised the Committee that he had amended the running order of the Agenda to bring forward Agenda Item No. 7 – Presentation by Portfolio Holder for Strategy, Performance & Finance to Agenda Item No. 5 following which the Agenda running order would resume as published.

### 108 PRESENTATION BY PORTFOLIO HOLDER FOR STRATEGY, PERFORMANCE & FINANCE

The Committee considered the report of the Portfolio Holder for Strategy, Performance & Finance which sought to provide Members with an update on the Corporate Peer Challenge Action Plan and three of the Council's Capital Projects: 32 Stodman Street; Ollerton and Clipstone Regeneration; and Newark Town Centre Masterplan.

#### Corporate Peer Challenge Action Plan

It was reported that the Action Plan had been developed by a cross-party working group and had been designed to deliver on the peer team's observations. This had resulted in a review of the Council's Community Plan which had been presented to full Council on 20 May 2025. Progress of the Action Plan was to be monitored by the Senior Leadership Team.



### 32 Stodman Street

The report set out the background to the project, including the rationale for the purchase of the building and how the project had been funded to-date, together with details of the reasons for the delay in completion and the need for additional grant monies.

### Levelling Up Fund 2 – Ollerton & Clipstone Regeneration Projects

The report set out the background to the project, providing details of the funding and the delays and changes experienced since it was identified by the Council and key partners as a local strategic priority in 2021/2022. Further specific details in relation to the two regeneration project areas were provided in paragraphs 4.8 to 4.10.

### Newark Town Centre Masterplan

It was reported that an in-depth update on the Masterplan had been provided at the previous meeting. It was reported that it would provide a long-term vision for the Town, offering confidence on what would be supported and resisted together with the identification of opportunity areas for future interventions and managing physical or spatial change. It would also inform landowner and investor decisions and could inform future interventions of the Council or potentially future grant-funding opportunities. It was also noted that the design code would be the first of its type in a historic setting.

In considering the report and presentation, Members raised a number of queries which the Portfolio Holder responded to directly.

In closing the debate, the Chair requested regular updates in relation to the Stodman Street retail units and also what support the Council may expect going forward in relation to Local Government Reorganisation.

AGREED that the report and presentation be noted.

## 109 NOTTINGHAMSHIRE & NOTTINGHAM DRAFT LOCAL NATURE RECOVERY STRATEGY CONSULTATION

The Committee considered the report of the Business Manager – Planning Policy & Infrastructure and the Ecology & Biodiversity Lead Officer which provided Members with details of the production and consultation on the Local Nature Recovery Strategy (LNRS) by Nottinghamshire County Council (NCC) and which also sought endorsement of the Council's proposed response to the consultation.

The report provided the background to the establishment of the LNRS advising that NCC had been appointed by the Secretary of State for Environment, Food & Rural Affairs on 26 June 2023 as the Responsible Authority for its preparation, publication, reviewing and re-publication. NSDC, along with other local authorities in Nottinghamshire, the East Midlands Combined County Authority and Natural England being identified as supporting authorities. The report noted that the LNRS must be evidence based, locally led and collaborative with details of what it must include being provided at paragraph 1.3 of the report. The report set out the work undertaken to produce a draft LNRS together with the process for its adoption.

In considering the report and the Council's proposed response Members made reference to a number of issues arising therefrom.

In relation to paragraph 5.1 of the consultation response, it was suggested that additional areas be mapped at the southern buffer zone on Lowfield Lane. The Business Manager advised that there were 2 local wildlife sites near to that area and an assessment would be made as to whether a grassland site could also be included.

A Member queried what, if any, safeguards were in place to maintain the mapped areas within the strategy, noting that many were in private ownership. The Ecology & Biodiversity Lead Officer advised that there was no obligation to maintain the mapping and that the landowners could request that their land be removed. The Business Manager advised that protected areas would remain unchanged and that wildlife sites would continue to be protected locally.

A Member queried whether consideration had been given to the purchase of land to further enhance biodiversity in the district. The Business Manager advised that a review of the Council's landholdings in this regard was to be undertaken with a possibility of specific purchases being made in the future for such development.

In closing the debate, the Chair requested that the Committee be kept informed as to the progression of the consultation and formal adoption of the Strategy.

AGREED that Appendix B to the report, be recommended to Cabinet for approval as the Council's consultation response.

#### 110 YORKE DRIVE DEVELOPMENT UPDATE

The Committee considered the report and presentation of the Business Manager – Regeneration & Housing Strategy. The Business Manager and the Senior Regeneration Officer provided Members with details on the following: the Yorke Drive Neighbourhood Study; accelerated construction funding 2017; outline planning approval 2019; developer procurement; reserved matters – challenges and outcomes; and reserved matters approval – January 2025. In considering the presentation Members raised a number of queries.

In relation to the impact on the population figures, a Member queried whether this would affect local schools. The Business Manager advised that an increase was expected but that Section 106 monies would mitigate that.

In response to a query raised about the anticipated final completion date of Winter 2031, the Business Manager advised that the predominant reason for the length of time to complete the project was due to the undertaking given to residents that they would only be required to move once.

A Member queried how confident Officers were in relation to adhering to the dates of each of the phases. The Business Manager advised that all the necessary permissions and funding were now in place so there should be no obstacles to hinder progress.

In closing the debate, the Chair referred to the numerous mentions of the potential impact of Local Government Reorganisation, noting that the Council needed to be aware of the delivery status of all of their capital projects. He thanked Officers for their continued efforts in ensuring that the project was achievable and requested that the Committee receive updates as to its progress.

AGREED that the progress of the York Drive Regeneration Scheme be noted.

111 ATTENDANCE AT COMMITTEE MEETING ON 30 JUNE 2025 BY CABINET MEMBER WITHOUT PORTFOLIO

The Chair advised Members that the Cabinet Member without Portfolio, Councillor J Kellas, was due to attend the next meeting of the Committee on 30 June 2025. He requested that Members forward any questions prior to the meeting in order that he could prepare his presentation accordingly.

112 APPOINTMENT OF PPI COMMITTEE REPRESENTATIVES TO:

AGREED that the following Members be appointed to:

- a) Tenant Engagement Board  
Councillors: Alice Brazier; Penny Rainbow; and Neil Ross
- b) Planning Policy Board  
Councillors: Linda Dales; Mike Pringle; Karen Roberts; and Tom Smith

113 UPDATE ON LIFE CHANCES FOR GIRLS WORKING GROUP

NOTED the verbal update of the Chair of the Life Chances for Girls Working Group, Councillor Karen Roberts.

114 CABINET FORWARD PLAN - MAY TO AUGUST 2025

NOTED the Forward Plan of the Cabinet for the period May to August 2025.

115 MINUTES OF CABINET MEETING HELD ON 1 APRIL 2025

NOTED the Minutes of the Cabinet meeting held on 1 April 2025.

116 PROVISIONAL ITEMS FOR FUTURE AGENDA

NOTED the provision items for future meetings of the Policy & Performance Improvement Committee.

Meeting closed at 7.50 pm.

Chair



Report to: Policy & Performance Improvement Committee – 30<sup>th</sup> June 2025

Director Lead: Suzanne Shead, Director – Housing, Health & Wellbeing

Lead Officer: Cara Clarkson, Business Manager Regeneration and Housing Strategy

Report Summary	
<b>Report Title</b>	Newark & Sherwood Community Lottery - Annual Report
<b>Purpose of Report</b>	To provide Members of the Policy and Performance Improvement Committee with an update on the Community Lottery scheme since its launch in May 2021.
<b>Recommendations</b>	The report be noted.

## 1.0 Background

- 1.1 Newark & Sherwood Community Lottery launched in May 2021 and has now been in operation for four years.
- 1.2 Ninety-six 'Good Causes' are currently registered with the lottery and receive financial support through ticket sales. The range of 'Good Causes' currently benefiting from the lottery includes: charities, sports clubs, community and youth groups and other 'not for profit' organisations, with a number generating in excess of £1,000 per year for their respective organisations.
- 1.3 There are currently 530 supporters registered with Community Lottery purchasing on average 1,263 tickets per week. Despite a reduction in supporters in the current year (from 570 to 530) the average number of ticket sales has increased and the total value generated has increased from £34,569.60 in the third year to £39,405.60 in the fourth year.
- 1.4 The District Council benefits from the lottery through two payment receipts each month. Players can choose for 50p of their £1 ticket to be donated to either a specific 'Good Cause' registered with the lottery or for it to go towards the 'Central Fund' which is held by the District Council. In 2024/25 this fund generated £4,989.50 for onward distribution by the Council to registered 'Good Causes'. In addition, 10p from every £1 ticket contributes towards the 'Operator Fund' which totalled £5,487.30 for 2024/25. The Operator Fund provides a contribution to the councils operating costs from running the Lottery including registration and licensing with the Gambling Commission and membership of the Lotteries Council.

- 1.5 At its meeting on 22 November 2021, Members of the Homes & Communities Committee approved a proposal to introduce a 'lottery within a lottery', whereby funds generated for the District Council are distributed to registered 'Good Causes' through a six-monthly raffle style draw. It was agreed that one-off awards of £500 are granted to successful groups, with the number of awards available at each draw dependant on the total income generated into the 'Central Fund'. In addition, any funding within the Operator Fund remaining after operating costs are covered, are also shared with 'Good Causes'.
- 1.6 In 2024/25 two lottery draws were held with eighteen awards of £500 going to registered 'Good Causes' as an additional income payment. Both draws were presided over by the Leader of the Council and 'live streamed' on Facebook. The winning 'Good Causes' were:

**Draw 1**

- Newark R&M Cricket Club
- Homestart Newark
- Collingham Youth and Community Association
- Thoresby Colliery Cricket Club
- Sir Donald Wolfitt Charitable Trust
- Sutton On Trent PTA

**Draw 2**

- 1st Bilsthorpe Scout Group
- 6th Newark Sea Scout Group
- Autism East Midlands
- Bilsthorpe Heritage Museum
- Mansfield Cat Rescue
- Newark & Sherwood CVS
- Newark Book Festival
- Newark Breast Cancer Support Group
- Newark Mencap
- Newark Patriotic Fund
- The Dukeries Community Workshop
- The Furniture Project Nottinghamshire

**2.0 Proposal/Options Considered**

- 2.1 This report is intended to provide a summary of the impact and benefits generated through the launch of the Newark & Sherwood Community Lottery after its fourth year of operation and the report is for noting. It is intended that an annual report will be presented to Policy & Performance Improvement Committee each year to ensure that members are appropriately informed of the positive contribution the lottery makes to voluntary and community sector organisations that provide support and assistance to residents of the district.

### **3.0 Implications**

In writing this report and in putting forward recommendations, officers have considered the following implications: Data Protection; Digital & Cyber Security; Equality & Diversity; Financial; Human Resources; Human Rights; Legal; Safeguarding & Sustainability and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

- 3.1 There are no adverse implications with this report, the launch of the Community Lottery has been a great success and is generating much needed financial support for the District's registered 'Good Causes' and has become a sustainable operating model where costs associated with its management are covered by proceeds generated

### **3.2 Financial Implications – (FIN25-26/9248)**

There is current provision within the General Fund Revenue budget for the Community Lottery on a self-funding basis, with ticket sales budgeted to offset all budgeted expenditure for Good Causes and Prizes. Any ticket sales which are unspent in each financial year are transferred to a reserve which is held solely for the purpose of funding future year commitments. There is currently £21,222.80 in this reserve.

### **Background Papers and Published Documents**

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

None



Report to: Policy & Performance Improvement Committee – 30<sup>th</sup> June 2025

Director Lead: Suzanne Shead, Director – Housing, Health & Wellbeing

Lead Officers: Cara Clarkson, Business Manager - Regeneration & Housing Strategy

Cheska Asman, Homeless Strategy Officer – Regeneration & Housing Strategy

Report Summary	
<b>Report Title</b>	Homelessness Prevention and Rough Sleeper Strategy and Delivery Plan (2024-2029) Annual Update – Year One.
<b>Purpose of Report</b>	To inform the committee on progress made within the first year of the Council's Homelessness Prevention and Rough Sleeper Strategy 2024-2029.
<b>Recommendations</b>	That progress against the delivery plan is noted.

## **1.0 Background**

- 1.1 A report was presented to the Policy and Performance Committee on 29<sup>th</sup> January 2024 and subsequently Cabinet on 20<sup>th</sup> February 2024, providing an update on the 2023 review of homelessness in the district, and to gain approval for the adoption of the council's Homelessness Prevention and Rough Sleeper Strategy 2024 – 2029.
- 1.2 Housing authorities have a statutory requirement under the Homelessness Act 2002 to carry out a homelessness review for their district and formulate and publish a homelessness strategy based on the results.

## **2.0 Proposal/Options Considered**

- 2.1 Following publication of the Homelessness Prevention and Rough Sleeper Strategy, a multi-agency delivery plan has been developed, with key actions aligned to each of the strategy's six objectives.
- 2.2 A new national Homeless Prevention Strategy, with a cross departmental approach to further tackle homelessness, is expected in line with the governments three-year spending review in June 2025 which provided an additional £100 million for early interventions to prevent homelessness. When released, this strategy may necessitate

further consideration and review of the council's strategic homelessness delivery plan to ensure ongoing alignment to national and local priorities.

2.3 A full review of the action plan is attached at Appendix 1 with a number of key projects highlighted below:

2.3.1 During 2024/25, Newark and Sherwood District Council's Homelessness Strategy Officer took the lead as the Rough Sleeper Initiative (RSI) Programme Manager across the seven district councils in Nottinghamshire. The partnership approach has now received an extension in funding for 2025/26 and the Strategy Officer will remain a part of the core county team delivering the revised Rough Sleeping Prevention and Recovery Grant.

2.3.2 During the year, the council has continued its involvement with the Safeguarding Adults Board. In compliance with the Care Act 2014 (Section 44), Safeguarding Adults Boards are expected to proactively commission Safeguarding Adult Reviews (SAR) in cases of deaths or serious harm or neglect, involving rough sleepers. Nottinghamshire has been proactive in this area, to date forty deaths (nine in Newark and Sherwood) have been considered at the Safeguarding Adults Board – Safeguarding Adults Review Sub-Group. The authority's Homelessness Strategy Officer currently sits on this group and presents each case for consideration. Progress has also been made to ensure that Public Health are aware of any suspected drug related or suicide deaths in carrying out their own reviews, negating the duplication of workstreams.

2.3.3 In September 2023, Nottinghamshire took part in the national pilot of a homeless women's Census, organised by Solace Women's Aid. The purpose of the pilot was to test more widely a methodology used in London to better understand the experience of women who are rough sleeping as they are often underrepresented in standard headcounts. Newark and Sherwood took the lead in coordinating a county and city census in 2024, the findings from which have resulted in the creation of a countywide Women's Severe Multiple Disadvantage Group.

2.3.5 During 2024/25, the Nottinghamshire district partners have been working on developing a Prison Release Protocol. Prison Release Protocols are in place in neighbouring counties such as Lincolnshire, Leicestershire and Derbyshire but not in Nottinghamshire. Due to the work undertaken, Nottinghamshire and Nottingham City are soon to launch a prison release protocol to achieve the Ministry of Housing Communities and Local Government's aim of preventing rough sleeping upon release from prison. The Nottinghamshire Prison Release Protocol will see a multi-agency team meeting on a fortnightly basis to plan prison releases and prevent a prisoner release to the streets or as homeless.

2.3.6 In April, strategic leads from Newark, Mansfield and Ashfield led a Homelessness Prevention and Rough Sleeper event providing key organisations with an opportunity to understand the workstreams underway and to provide an opportunity to be part of a workshop developing the focus for the next year and identifying synergies between partners.

2.3.7 Pending the introduction of the Supported Housing (Regulatory Oversight) Act 2023. Newark and Sherwood has collaborated with county colleagues to commission



Homeless Link to carry out a Supported Housing Needs Assessment, the results of which are due August 25. The needs assessment will lead to a countywide Supported Housing Strategy to support the council's response to the Supported Housing Act 2023.

### **3.0 Implications**

In writing this report and in putting forward recommendations, officers have considered the following implications: Data Protection; Digital & Cyber Security; Equality & Diversity; Financial; Human Resources; Human Rights; Legal; Safeguarding & Sustainability and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

#### **3.1 Financial Implications - (FIN25-26/3124)**

There are no additional financial implications arising within this report. In 2024/25 the council received £388,368 from the Homelessness Prevention Grant, and the same amount is due to be received in 2025/26. Additional grant may be received within the year but currently this is unknown and unconfirmed.

#### **3.2 Legal Implications**

There are no additional legal implications arising from this report. The Housing and Rough Sleeping Strategy ensures compliance with the Homelessness Act 2002, Homelessness Reduction Act 2017 and the Rough Sleeping Strategy 2018

#### **3.3 Equality Implications**

There are no additional equality implications arising from this report. Equality implications are considered within the Homelessness Review, noting the complexity, challenges and circumstances that can present because of individuals protected characteristics and how this impacts their experience of homelessness or rough sleeping.

### **Background Papers and Published Documents**

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

<https://democracy.newark-sherwooddc.gov.uk/documents/s19077/20.02.24%20-%20Homelessness%20and%20Rough%20Sleeper%20Strategy.pdf>

# HOMELESSNESS PREVENTION AND ROUGH SLEEPER STRATEGY

## 2024 – 2029

### DELIVERY PLAN

The Homelessness Prevention and Rough Sleeper Strategy Delivery Plan is a collective plan to tackle homelessness with partners that will be equally responsible for its delivery.

The focus, as part of the Newark and Sherwood Homelessness and Rough Sleeper Strategy 2024-29 has been designed as a result of the Homelessness Review 2023, with feedback from the participants and organisations that took part in the consultation and the launch and workshop of the strategy in March 2024.

The following objectives, tasks and actions will be prioritised. We will report to the Mid Nottinghamshire Joint Homeless Prevention Strategic Group and the Newark and Sherwood Homelessness Interagency Forum. Yearly updates will also be reported to the NSDC committee structure.

Objective 1 - Early intervention through effective partnership working, with a particular focus on those becoming homeless from a private rented sector tenancy, friends, and family no longer able to accommodate or as a result of domestic abuse.		
Task - Prevent as many residents as possible from becoming homeless from the privately rented sector		
Action	Lead and partners	Progress
Prioritise training and development of key NSDC employees in line with current legislation - Review training needs annually and participate in regular development sessions for ongoing training.	Senior Housing Options Officer	In progress – Options for additional resource to support this action are being explored.
1.Explore free legal advice to help those that are being served section 21 notice.  2.Referral pathway to the law centre to be developed and rolled out to teams.	1. Homelessness Strategy Officer and Nottingham Law Centre. 2. Senior Housing Options Officer	Not started – on hold pending the Renters Reform Bill from Government.

Implement changes required as a result of the Renters Rights Bill when this is enacted		Not started – on hold pending the Renters Reform Bill
Build a private sector offer that is safe, secure and attractive by reviewing the current PRS and developing joint-working relationships with local landlords. Including incentives available to secure offers of accommodation for our applicants.	Senior Housing Options Officer  Landlord Liaison Officers	Complete – structures are in place through the Landlord Forum for engagement with local landlords and these will continue.
<b>Task - understand the reasons that friends, and family can no longer accommodate and find solutions, such as mediation or incentives to continue to accommodate.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Progress system change to ensure reasonable notice is given by friends and family before making an individual homeless (guidelines state 28 days' notice is reasonable)		Complete
Agree a process and policy to utilise the internal mediation facility within housing (9 x trained officers)	Senior Housing Options Officer	Not started
Gain greater understanding on the reasons that friends, and family can no longer accommodate and what could incentivise a stay in accommodation.	Senior Housing Options Officer  Homeless Strategy Officer	In Progress –data is being collated by front line officers to develop a robust understanding of the reasons why accommodations with family and friends fail and what could be done to extend.
<b>Task - consider and tackle the rise in single homelessness and the complexities that can make it harder for services to prevent homelessness.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Influence or increase the housing options available for single people and couples. Consider the demand for one bed, the level of support required and access to commissioned and non-commissioned beds in the area.	Homelessness Strategy Officer	In progress – in response to the Supported Housing Regulatory Oversight Act the council is undertaking a Housing Needs Assessment, commissioned to Homeless Link.
Implement any changes to policies, procedures and practices as identified by the MEAM project – encourage and support others to do the same.	MEAM Network – Nottinghamshire Homelessness Strategy Officer Senior Housing Options Officer	In Progress - Homelessness Strategy Officer sits within the core group.

Wider strategic team support to increase capacity as we see more legislation, national, regional, and local policy changes and a greater level of need.	Business Manager – Housing, Health and Wellbeing	In progress – synergies recognised with Housing Strategy Team within the Regeneration and Housing Strategy Business Unit - officers are now working closer together to develop capacity and resilience in the team.
<p>Prioritise appropriate Institutionalised release/discharge for homelessness/SMD</p> <ol style="list-style-type: none"> <li>1. Hospital discharge mapping</li> <li>2. Support the development of and implement the prison release protocol when launched.</li> </ol>	<p>Homelessness Strategy Officer (Development)</p> <p>Senior Housing Options Officer (local implementation)</p>	<p>Complete and ongoing - challenge within the Ending Rough Sleeper Plan for Institutionalised release/discharge.</p> <p>Temporary measures are in place to continue the Sherwood Forest Hospital Trust Severe Multiple Disadvantage Service until 31.03.26 and pending future NHS plans. Funding has been sourced from Homelessness Prevention Grant.</p>
<p>Ministerial Recommendations for Safeguarding Adults Board:</p> <ol style="list-style-type: none"> <li>1. Governance structure, accountability and system-wide change.</li> <li>2. Named board member for rough sleeping.</li> <li>3. Strategic plans, annual reports and procedures.</li> <li>4. Safeguarding Adult Reviews.</li> </ol>	Director of Housing	Complete – Representatives sit on the Safeguarding Adults Board and the Safeguarding Adults Review Subgroup.
<p>Identify opportunities to improve the Duty to Refer process and encourage partners to implement changes.</p> <p>Ensuring partners such as Police, NHS, Charities etc have sufficient training around early intervention and signposting pathways at first contact.</p>	RSI leads and steering group.	In progress – plans are pending to deliver an awareness raising session to Nottinghamshire County Council youth homelessness and care leavers leads.
<b>Task – Contribute to enhancing services for those at risk of or fleeing domestic abuse (in line with the Domestic Abuse Act 2021)</b>		
Contribute to the Domestic Abuse Housing Alliance (DAHA) accreditation.	DA Coordinator	In progress – accreditation process taking place with training being rolled out to staff across the organisation.

Accept Equations offer to provide a 'drop in' service for male and LGBTQ+ survivors of DA seeking housing.	Senior Housing Options Officer	Not progressing – Equation have withdrawn this offer
Support DA survivors with their choice of area - delivery through DAHA.	Senior Housing Options Officer	Complete
<b>Objective 2 - The provision of an accessible, agile, and responsive homelessness service</b>		
<b>Task - Provide or enable a high-quality service (this relates to the whole system) that customers are satisfied with and provide opportunities for customers to influence the design and delivery of services.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Ensure that the service is promoted and shaped by involving and listening to those with lived experience.	Senior Housing Options Officer	In progress – An internal service review is ongoing to ensure current processes are fit for purpose and the service is accessible to all.
Join the Andy Gale academy and share with other agencies – includes Part 6, Part 7 and PRS	Senior Housing Options Officer	Not started
Ensure the NSDC website continues to be relevant and updated.	Senior Housing Options Officer	In progress – as part of the service review
Adopt a more data-driven and evidence-based approach to tackling homelessness.	Homelessness Strategy Officer – Analysis Senior Housing Options Officer - Collation	Not started
Making services accessible to non-UK nationals (NUKN) – language barrier, understanding UK system	Homelessness Strategy Officer and Nottinghamshire Law Centre Senior Housing Options Officer	In progress – The first phase NUKN Gap Analysis and exploration of opportunities to increase immigration advice throughout Nottinghamshire is complete and will be followed by development of proposals for change.
Hold an annual stakeholder event to share progress in delivering the strategy and co-produce an annual action plan	Homelessness Strategy Officer	Complete
Explore opportunities to use emerging technology to provide a high-quality service	Homelessness Strategy Officer	Not started

Participate in the Youth Homelessness Forum – implement any updates or changes as a result of the Ministerial recommendations for Care leavers	Senior Housing Options Officer Senior Housing Choice Officer	Complete
<b>Objective 3 - Access to affordable and quality accommodation across all sectors</b>		
<b>Task - help as many residents as possible to move from one home to another without the need for emergency and temporary accommodation - influence where accommodation is needed, what type and that it is of good quality.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Implement or contribute to the responsibilities in the Supported Housing Regulatory Oversight Act.	Homelessness Strategy Officer	In progress –countywide joint Supported Housing Needs Assessment has been commissioned through Homeless Link.
Contribute to a solution to ease the silting up of supported housing move on – continue to work with providers in relation to those that are ready to move on, assess and award points, fund or assist into private rented accommodation.	Business Manager – Housing and Estates	In progress – A “Ready to move” agreement has been reviewed and updated.
Supported housing improvement <ul style="list-style-type: none"> <li>- Support the development of a single referral form by MDC and countywide roll out</li> <li>- Explore opportunities to engage with supported housing providers to maximise housing options for rough sleepers that are sustainable</li> <li>- Support a countywide review of single homeless pathways</li> </ul>	Homeless Strategy Officer  RSI Programme leads	In progress - Pending agreement to fund and carry out a single person pathway analysis throughout the county.
Support owners of empty properties to bring them back into use as affordable housing for homeless households through the pilot project jointly funded by EMC.	EMCCA Homelessness Task Force  Housing/Homelessness Strategy Team	Not started

<b>Task - To understand and contribute towards a robust private rented sector in Newark and Sherwood. PRS is our biggest reason for homelessness, but also our second main type of accommodation secured for homeless households after social housing.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Reduce the number of allocations, that have been awarded a homelessness banding moving from the Private Rented Sector or no longer able to stay with friends and family. Priority to be given to the prevention of homelessness from this type of accommodation.	Senior Housing Options Officer  Senior Housing Choice Officer	Not started
<b>Objective 4 - Tackle rough sleeping by developing and improving pathways</b>		
<b>Task - No fixed abode is high but a cohort that we know little about. Proactively contact residents who are “hidden homeless”.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Implement learning from the Safeguarding Adults Review – Subgroup in relation to rough sleeper deaths.	Homelessness Strategy Officer  SAR Subgroup – Rough Sleeper deaths	Complete
Review the effectiveness of proactive contact with “hidden homeless” housing allocation applicants, with a particular focus on women	Senior Housing Options Officer Senior Housing Choice Officer	Not started
Gain greater knowledge on where people are staying and how they secure a place to sleep which prevents rough sleeping.	Homelessness Strategy Officer	In progress – The Homeless Women’s Census 2023 and 2024 will inform this piece of work.
<b>Task - The Rough Sleeper Initiative may come to an end before the end of this strategy, create a contingency plan if RSI funding ends and there are no further rounds of funding available.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Work with the RSI Programme Leads and County Districts and Boroughs to continue county-wide services under the Rough Sleeping Initiative (RSI)  Evaluate and explore avenues of funding to continue the core services if funding is lost or ceases.	Homelessness Strategy Officer	Complete

Adopt/implement/engage in the Nottinghamshire Ending Rough Sleeper Plan	Homelessness Strategy Officer	In progress – Plan recently reviewed on behalf of the county for 25/26. Discussed at bi-monthly Nottinghamshire authorities and MHCLG meetings.
Facilitate the annual National Rough Sleeper Count	Senior Housing Options Officer	Complete
Participate in the National Homeless Women's Census 2024  Participate in the Homeless Women's Group or actions as a result.	Homelessness Strategy Officer Senior Housing Options Officer	In progress – taking part in the annual census and attending the newly formed SMD Women's Group.  Challenge within the Ending Rough Sleeper Plan – Improve services/support for homeless women
Continually improve, develop services and align goals by working closely with partners across Mid Notts.	Homelessness Strategy Officer	In progress – efforts are made to recognise and work collaboratively on similar actions within each strategy.
<b>Objective 5 - Linking health, well-being, and housing together to improve the life chances and aspirations of those affected</b>		
<b>Task - To ensure Psychologically Informed Environments (day to day running of services are designed to take the psychological and emotional needs of people with these experiences into account) and Trauma informed Care (opportunity for individuals to engage more fully in their health care, to develop a trusting relationship with their provider) are indicated in the shaping and progression of the strategy and delivery plan.</b>		
<b>Action</b>	<b>Lead and partners</b>	<b>Progress</b>
Launch and build the Online Skills and Training needs assessment for tenants and residents.  Link with children's services in the area for children's projects in temporary accommodation.	Homelessness Strategy Officer (Design) Senior Housing Options Officer (Development)	In progress – Launched in September 2024.  Comms plan and group recently created to progress and promote further and maximise success.
Complete and embed the learning from the RSI trauma informed approach training courses.  Provide staff with reflective practice opportunities.  Sign up to the countywide Trauma Informed Charter.	Public Health - countywide  Senior Housing Options Officer  Business Manager – Housing and Estates	In progress - included within the Ending Rough Sleeper Plan.



Task - Better understand the projections of core homelessness levels, the housing market needs and the anticipation that there may be a rise in homelessness in Newark and Sherwood between 2024 – 2029		
Action	Lead and partners	Progress
Strengthen the links between health, housing and homelessness strategies.	Homelessness Strategy Officer  Health and Wellbeing Officer  Housing Strategy Officer	In progress – All officers now work within the same Business Unit and gaining better insight into each strategy and the relevant synergies
<b>Objective 6 - Delivering holistic support solutions to sustain long term tenancies and prevent homelessness and rough sleeping.</b>		
<b>Task - Encourage and support leaders of key organisations to do more to prioritise Homelessness and Severe Multiple Disadvantage</b>		
Action	Lead and partners	Progress
Support, monitor and engage with partners that can assist and enhance homelessness prevention.	Homelessness Strategy Officer  Senior Housing Options Officer	Complete with grant agreements in place with: HomeStart Citizens Advice Central Nottinghamshire Furniture Project
Build and maintain relationships with faith groups, ensuring the provision provided is supported and included within pathway plans as appropriate.	Landlord Liaison Officer	In progress and ongoing





Report to: Policy & Performance Improvement Committee – 30 June 2025

Director Lead: Sanjiv Kohli, Deputy Chief Executive and Director - Resources

Lead Officer: Nick Wilson, Business Manager – Financial Services, Ext. 5317

Report Summary	
<b>Report Title</b>	Corporate Annual Budget Strategy for 2026/27
<b>Purpose of Report</b>	To set out the General Fund, Capital & HRA Budget Strategy for 2026/27, for consideration by Members before detailed work commences.
<b>Recommendations</b>	<p>That Cabinet:</p> <ul style="list-style-type: none"><li>a) approve the overall General Fund, Capital &amp; HRA Budget Strategy for 2026/27;</li><li>b) note the consultation process with elected Members;</li><li>c) note that Budget Officers continue work on the assessment of various budget proposals affecting services for consideration in setting the Council's budget; and</li><li>d) note that Budget Managers work with Finance Officers in identifying further efficiency savings, increasing income from fees and charges and in identifying new sources of income.</li><li>e) To review the policies and principals on Budgeting, Council Tax, Reserves and Provisions, Charging, Value for Money and make any recommendations to Council.</li></ul>

## **1.0 Background**

- 1.1 The Council's Constitution sets out the process for developing the Council's Annual Budget.
- 1.2 The process requires that, each year, the Council's Section 151 Officer presents a report on the overall budget strategy for the forthcoming financial year, to the Policy and Performance Improvement Committee.

## **2.0 Budget Proposals**

### **2.1 Budget Presentation**

- 2.1.1 The budget process will result in setting the General Fund budget and the Council Tax for 2026/27 and will be approved by Council at its meeting on 5 March 2026.

- 2.1.2 The budget process will result in setting the Housing Revenue Account budget and the rent setting for 2026/27 and will be approved by Council at its meeting on 10 February 2026.
- 2.1.3 The budget process will result in setting the Capital Programme budget for 2026/27 to 2029/30 and will be approved by Council at its meeting on 5 March 2026.

## 2.2 Financial Policies

- 2.2.1 The Council has agreed policies on Budgeting and Council Tax, Reserves and Provisions, Charging, Value for Money and also a set of Budget Principles which set out the approach to be taken in setting the budget for each financial year. These policies were last reviewed by Cabinet on 24 September 2024. The policies and principles have been reviewed and updated where necessary and are attached as **Appendices A to F for review**.

## 3.0 Budget Strategy

### General Fund

- 3.1 The current Medium Term Financial Plan (MTFP) was approved on 6 March 2025.
- 3.2 The table below sets out the summary of the financial forecast, identified within the current MTFP, assuming Council Tax at average Band D will increase by the same rate as in the 2025/26 financial year, i.e. 1.94%:

	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	2028/29 (£m)
Net Service Expenditure (less capital charges)	20.722	21.046	21.149	21.750
Total Other Expenditure	0.178	0.786	1.046	1.107
<b>Total Expenditure</b>	<b>20.900</b>	<b>21.832</b>	<b>22.195</b>	<b>22.857</b>
Business Rates: receivable annually	(10.593)	(9.785)	(9.785)	(9.785)
Business Rates: other adjustments	(0.252)	0.000	0.000	0.000
Council Tax: receivable annually	(8.484)	(8.730)	(8.982)	(9.240)
Council Tax: other adjustments	0.174	0.000	0.000	0.000
Other Grants	(2.061)	(0.819)	(0.770)	(0.716)
Contribution (to) or from Reserves	0.404	0.174	0.174	0.174
<b>Funding Shortfall prior to Mitigations</b>	<b>0.088</b>	<b>2.672</b>	<b>2.832</b>	<b>3.290</b>

- 3.3 The national context around future local government funding is uncertain. The government has had plans to reform the local government finance system for a number of years. The government initially intended for these reforms to take effect from 2020/21. However, it appears that 2026/27 will be the year that funding reforms finally take place. The Government has launched a consultation on the resetting of the Business Rates Retention System which will affect the amount of Business Rates income that Local Authorities receive. Later this year it is anticipated that further consultation will be published regarding the Relative Needs and Resources review.

### Bridging the Gap

- 3.4 Whilst the table above forecasts large gaps in each of the final three financial years, the MTFP, approved in March 2025, also described ways in which the Council will bridge the gaps in funding. The table below summarises these mitigating measures:

	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)	2028/29 (£m)
<b>Funding Shortfall prior to Mitigations</b>	<b>0.000</b>	<b>2.672</b>	<b>2.832</b>	<b>3.290</b>
<b>Previous Year Mitigation</b>			<b>(0.885)</b>	<b>(1.148)</b>
Dividends from Arkwood Developments Ltd	-	-	(0.250)	-
Target saving for borrowing costs and MRP	-	(0.300)	-	-
Savings from Leisure Management review	-	(0.142)	(0.013)	(0.005)
Savings from service reviews	-	(0.098)	-	-
Savings/efficiencies from making business processes more efficient	-	(0.252)	-	-
Increased income from the Council becoming more commercial	-	(0.093)	-	-
Use of MTFP reserve to offset contributions from reserves in future years	(0.088)	(1.787)	(1.684)	(2.137)
<b>Proposed General Fund Funding Gap</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>

### **Housing Revenue Account**

- 3.5 The assumptions to be used within the update of the Housing Revenue Account (HRA) Business Plan will be presented to the Policy and Performance Improvement Committee in September and Cabinet in November. These HRA specific assumptions (such as numbers of Right to Buy receipts) will then inform the creation of the HRA budget.

### **Budgeting Assumptions**

- 3.6 The following underlying assumptions will be applied in compiling the draft General Fund and HRA budgets for 2025/26:

#### **3.6.1 Base Budget**

The base budget for 2026/27 will be derived from the original 2026/27 notional budget as compiled in the preparation of the MTFP for 2025/26 to 2028/29 and approved by Council on 6 March 2025. This will aid in the transparency of the change in assumptions process and will also ensure that changes in resource allocations are captured and reported accordingly.

#### **3.6.2 Staff Costs**

It has been assumed that within the Service Unit budgets, the Council will employ 100% of the Council's establishment throughout the year except for known unfilled vacancies where salaries are budgeted to commence on the anticipated starting date.

The Council are yet to receive information relating to the current years (2025/26) pay award for green and red book staff. A budget equivalent to a 3% increase was applied to 2024/25 salary scales for the 2025/26 financial year. The employer's offer for the current 2025/26 year is 3.2%

with the employees’ side asking for a significantly higher increase. In the past, the final national pay settlement has been closer to the employer’s offer and therefore it is proposed that the pay costs are budgeted to increase by 3.5% and that this increase is applied throughout the next revision of the MTFP. If the national joint councils’ agreement is significantly different from this assumption, then an adjustment will be made before closing the budget process for 2026/27.

A vacancy provision of 7.5% of the total salary budget for 2026/27 will be made to allow for natural savings being made from posts remaining vacant before being filled. With the challenges in recruiting that have been seen over the last two financial years, this appears to be a reasonable approach. The actual outturn of savings from vacancies amounted to 8.4% for 2024/25. As it is not possible to predict precisely which business units will experience vacancies in the year, an overall saving will be set aside. This value of this provision will be determined once the total salary budget for 2026/27 has been calculated.

3.6.3 Employer’s Superannuation

A triennial review is currently taking place on the Nottinghamshire Pension fund, to determine the contributions necessary for the next three year period from 1 April 2026. To do this, the Pension Fund evaluates balances as at a point in time every three years, and sets the contribution rates, to give employers stability of payments. The lead pensions Partner from Barnett Waddingham presented to Chief Finance Officers (CFOs) across the County to review the current position on the pension fund. He is expecting to report back to CFO’s with the triennial review results available for mid-October. The results of this report will be built into the revised MTFP and budget for 2026/27.

3.6.4 Provision for Inflation

The Council is exposed to several different costs that rise at various rates of inflation. The Consumer Price Index is the measure that references the weighted average prices of a basket of consumer goods and services and is measured on a rolling annual basis. This measure is used for most of Council consumables outside of Pay/Utilities and vehicle costs. Prior to August 2021, CPI had been 3% and under, going as far back to April 2012. Since that August 2021 CPI had increased month on month with the peak being 11.09% in October 2022. Whilst CPI has come down to 2.6% in March 2025, this does not mean prices are cheaper than at their peak, it means that prices are increasing at a slower rate than the peak. Indeed, looking at the measure prices are 25.2% higher in March 2025 compared to March 2020. This is due to the sustained increase in prices month on month between October 2021 and March 2024, where CPI was 3% or greater throughout that period. It is the Government’s target that inflation would reduce to 2% per annum, whereas it is felt prudent to budget slightly above that incase the target isn’t met.

The Council has a number of properties within its portfolio and hence is exposed to increases in cost in relation to electricity and gas. Wholesale energy prices have been at an all-time high over the course of the last 12 months, based on factors such the post covid increase in activity and the war in Ukraine. Due to this energy prices have ranged in increase but are putting significant strain on both residents and businesses for which the Council is not immune.

Based on the above, it is felt reasonable to utilise the following inflation rates (for non-contracted costs) in the production of the budget and MTFP:

	2026/27	2027/28	2028/29	2029/30
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General Inflation	2.5%	2.5%	2.5%	2.5%
Utilities	5%	5%	5%	5%
Transport (Fuel)	5%	5%	5%	5%
Transport (parts)	8%	6%	6%	6%

### 3.6.5 Fees and Charges

Changes in fees and charges will be subject to specific, detailed review by business managers who will compare the Council's fees for discretionary services to other neighbouring and family group authorities that provide the same services. The business managers will also benchmark the fees with other commercial organisations where similar services are provided. Business managers will also assess and evaluate whether new fees and charges can be introduced for discretionary services that are not currently being charged for. The Council's charging policy is included in Appendix D.

Where comparative benchmarking information is not available, an increase equivalent to general inflation, **as stated in the table above will be applied**. For clarity, this figure is used for uplifts in fees and charges but will not be used to set car parking fees or forecast changes in rental income for dwellings within the HRA. The assumptions around that figure will be included within the refresh of the HRA Business Plan.

### 3.6.6 Interest Rate

The Council is proposing to borrow money in order to support its cash flow position. During previous financial years, decisions regarding capital expenditure have been taken to utilise internal resources and maintain an under borrowed position against its Capital Financing Requirement. This is not uncommon across the Local Government sector, at a time when budgets have been squeezed, but reserves have existed. The Council is proposing to utilise elements of its reserves to fund various capital projects going forward. This will mean that cash backed by these reserves will be utilised, hence there is a need to borrow money to ensure that the Council has cash at hand to service its day-to-day costs. The timing of borrowing funds will be dictated by the Council's cash flow which forecasts daily expected income and expenditure over the next 4 years. Treasury Advisors Link Group will be consulted with prior to borrowing to ensure that the Council takes the most economic route, be that either a fixed or variable rate borrowing, ensuring compliance with the approved Treasury Management Strategy. Rates will be monitored over the coming months until such time that the borrowing is secured.

## 4.0 Risks in Preparation of the Budget

- 4.1 The basis of the budget strategy will ensure that the Council delivers a balanced budget in March 2025; however, there are risks that may cause expenditure to increase or income to reduce. Consequently, income and expenditure levels will be kept under review throughout the budget process.
- 4.2 It is essential to ensure that the strategic budget efficiencies and additional income are delivered as this is central to ensuring that the Council has a balanced budget. The delivery

of the efficiencies and additional income will be kept under continuous review throughout the budget process.

- 4.3 It will not be possible to finalise funding in the budget until government announcements on future funding levels are published later in the year. Members are asked to approve the budget strategy as set out in this report, in order for the main provisions of the budget to be built.

#### Local Government Re-Organisation

- 4.4 It is expected that during the MTFP period, a new unitary authority will be created which will take over the responsibilities currently undertaken by this Council. At this stage it is difficult to forecast any changes in policy, spend or resources and therefore budgets will be built in accordance with current policy direction. Once the final business case has been submitted to Government in November 2025, and a decision made regarding what authority will be created, discussions at that stage will then start to shape resourcing requirements thereafter.
- 4.5 It is therefore not expected that the MTFP for 2026/27 to 2029/30 will include any changes in spend profile or policy shift, but that the MTFP for 2027/28 to 2030/31 will include that shift in direction.

### **5.0 Timetable**

- 5.1 The Budget Timetable is dictated by the corporate timetable for the Executive arrangements together with the Community Plan refresh. The essential deadline is that the Council is to set the level of Council Tax for 2026/27 at its meeting on 5 March 2026.
- 5.2 The table below describes the key activities and dates for the production of the budget.

Date	Activity	Description
30 June 2025	Budget Strategy reviewed by Policy & Performance Improvement Committee	Sets the overall direction of the setting of the budget and high level assumptions
8 July 2025	Budget Strategy approved by Cabinet	Sets the overall direction of the setting of the budget and high level assumptions
31 October 2025	Cash budgets completed	The completion by all Budget holders of the cash resources needed to fund service provision over the MTFP period
w/c 10 November 2025	Director and Budget Holder review	In order for the Director to challenge the budget holders to ensure internal scrutiny of resource provision
25 November 2025	Service budget review by SLT	Holistic review of overall service budget provision by SLT
1 December 2025	Policy & Performance Improvement Committee review (HRA Only)	To review the assumptions around the HRA budget
w/c 8 & 15 December 2025	Portfolio Holder review	Portfolio holder scrutiny over service budget provision

w/c 19 January 2026	Informal meeting with Portfolio Holders, Chair and Vice Chair of Policy & Performance Committee	Holistic review of the whole budget inclusive of the draft LGFS
20 January 2026	Cabinet review (HRA Only)	Cabinet review and recommendation to Full Council for approval of 2026/27 HRA budget
10 February 2026	Council approval (HRA Only)	Council approves HRA budget for 2026/27 and Rent setting
23 February 2026	Policy & Performance Improvement Committee review (GF Only)	PPI Committee to scrutinise proposed budget for 2026/27
24 February 2026	Cabinet review (GF Only)	Cabinet review and recommendation to Full Council for approval of 2026/27 GF budget
5 March 2026	Council approval (GF Only)	Council approves GF budget for 2026/27 and Council Tax setting

## **6.0 Consultation**

- 6.1 As the production of the budget will be predicated on the priorities within the Community Plan, resource allocation will be linked to spending priorities. As the budget is to be derived based on the notional budget set for the forthcoming year (as per the approved MTFP), and changes made during the current financial year are factored in, consultation will continue to take place throughout the 2025/26 financial year. Members will continue to have an opportunity to shape the budget through approving/rejecting reports brought to Cabinet in year.
- 6.2 Once the first draft of the budget has been prepared, this will be reviewed by the Senior Leadership Team to ensure budget is aligned to the Community Plan priorities, during November 2025 as described in the table above.
- 6.3 Portfolio Holders will then be briefed on the proposals. This will enable a review of service budgets prior to presentation to Policy & Performance Improvement Committee during the January cycle of meetings. This will be facilitated by Financial Services, with the services Director and Budget holders presenting their budgets.
- 6.4 The Policy & Performance Improvement Committee will have the opportunity to scrutinise the budget proposals prior to Cabinet recommending to Council for approval.
- 6.5 As in previous years, consultation on the budget will take place with Commercial Business Ratepayers. This will be advertised on the Council's website between the Cabinet meeting in February and the Council meeting in March.

## **7.0 Capital Programme 2025/26 – 2028/29**

### **7.1 Prioritisation for the General Fund Schemes**

- (a) When business cases for new schemes are brought to Cabinet, financing implications of capital expenditure are included to assess the viability of the scheme and to enable members to make informed decisions. Once the capital expenditure has been incurred,



the financing of the Capital Programme is arranged by the Section 151 Officer, in line with the Council's Constitution. This may include use of internal resources, borrowing from internal resources or external borrowing. An appraisal of the most appropriate funding source will be included within the business case.

- (b) Capital projects for the new financial year will initially be commissioned by the Senior Leadership Team. These projects will then be assessed against the prioritisation criteria (see **Appendix D**) and will be ranked accordingly. Based on this assessment a report will be prepared for submission to Cabinet in February 2026, before final approval by Council on 5 March 2026.

## 7.2 Prioritisation for the Housing Revenue Account Schemes

The current HRA Capital programme reflects the latest available information agreed by officers within the Housing, Health and Wellbeing directorate. Resources for future years will reflect the ability of the HRA to support any necessary borrowing, and other funding opportunities which may arise.

## 8.0 Implications

In writing this report and in putting forward recommendations officers have considered the following implications: Data Protection, Digital and Cyber Security, Equality and Diversity, Financial, Human Resources, Human Rights, Legal, Safeguarding, Sustainability, and Crime and Disorder and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

## **Background Papers and Published Documents**

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

None

**Policy on Budgeting and Council Tax****Introduction**

Each year the Council is required to set a Council Tax in accordance with the provisions of the Local Government Finance Act 1992. It is a requirement of the Act that the Council Tax must be set by 10 March each year.

The Council sets its Annual Revenue Budget in March each year in accordance with the provisions of the Budget Process, which forms part of the Council's Constitution.

The District Council is also responsible for collecting the Council Tax requirement (precepts) for Nottinghamshire County Council, Nottinghamshire Police & Crime Commissioner and Nottinghamshire Fire and Rescue Service and any precepts set by the Parish and Town Councils or Parish meetings within the District. All of these Councils are required to notify the District Council of their requirements before 1 March each year.

The District Council has no control over the level of Council Tax or precept set by the precepting bodies. This policy covers the District Council element of the Council Tax only. Nevertheless, it is recognised that public perception is influenced by the overall level of Council Tax and it can be difficult to appreciate that the requirements of the District Council form only a part of this. In fact, the District Council's spending requirements account for around 8% of the total Council Tax bill.

The Government has powers to require local authorities setting "excessive Council Tax increases" to hold a local referendum on the level of Council Tax. The level of excessiveness for the 2025/26 financial year was set at 3% or £5 increase but may be different in subsequent years. This information is provided within the Local Government Finance Settlement which is published during Winter each year.

The District Council's spending requirement includes an amount levied upon it by other bodies. For this Council an annual levy is made by the Trent Valley and Upper Witham Internal Drainage Boards of circa £950,000.

**Current Level of District Council Tax**

The District Council's level of Council Tax for 2025/26 is £198.60 for a Band D property. This represents a 1.94% increase in council tax on 2024/25. The total bill, including all major precepts, is £2,486.46 whilst the average Parish Precept is a further £95.76. In order to arrive at this level of Council Tax, the Council assessed its needs over the medium term and resolved to approve an increase at the minimal level possible whilst ensuring it remains cognisant of the challenges it faces ahead.

**Consultation**

The latest Resident Survey was delivered in 2022 and was open for nearly 6 weeks. Within the survey, a range of questions were asked to gather a picture of their experiences as a resident, their satisfaction with Council services and their views on their local area. It consisted of 16 questions that were predominately multiple choice, with some open questions allowing residents to expand on their answers.

As the feedback from the Resident Survey helps inform and shape our Community Plan, it is important that the consultation provided a holistic and balanced account of the district. To ensure this was achieved, three work streams were delivered as a part of the consultation:

- The open survey that was available for any resident over the age of 16
- A representative survey to allow us to recognise any bias in the open survey from under or overrepresented demographics
- Focus groups to ensure the voices of typically underrepresented groups were heard

In the open survey, 4,577 responses were captured, and this equated to a 3.7% response rate, so around 4 in 10 residents completed the survey. The results of this consultation was used to shape Council services and inform the strategic direction of the Council with the creation of the Community Plan. Budgets have been and will continue to be aligned to the Community Plan to ensure that resources are directed at services which will deliver the priorities described in this document.

### **Proposals**

The absolute level of Council Tax, and any annual increase, will depend on the demands facing the District Council, external funding available, and the Council's assessment of the appropriate level of Council Tax. Whilst these factors will vary from year to year, the following criteria will be taken into account when considering the level of Council Tax:

- The Priorities and Objectives of the Council as set out within the Community Plan
- Inflation
- Consultation Responses
- The level of Council Tax considered to be acceptable to the public
- Government views on grant levels and referendum criteria
- Service demands

**Newark & Sherwood District Council aims to set the minimum level of Council Tax acceptable consistent with the achievement of its Priorities and Objectives and other financial and service demands.**

**General Fund Balances and Reserves Policy**

Section 25 (Budget calculations: report on robustness of estimates etc) of the *Local Government Act 2003* requires local authority chief finance officers (Section 151 officers) to report on the adequacy of financial reserves in the council's proposed budget and robustness of estimates made.

The Council will review the adequacy of its useable financial reserves to ensure that these are neither too low (imprudent) or too high (over-prudent) based on their purpose and likely use.

Council's generally hold useable reserves for three purposes:

- as a working balance, to mitigate the impact of uneven cash flows;
- as a contingency, to mitigate the impact of unexpected events or emergencies; and
- as earmarked reserves, to pay for known or predicted future requirements.

The Council has a fixed £**Error! Reference source not found.**m General Fund balance which has been set aside to pay for exceptional items. Officers consistently review the appropriateness (prudence) of this amount in light of internal and external risks identified. For the council to maintain its current General Fund balance of £**Error! Reference source not found.**m, it is intended that the General Fund balance will only be used to fund expenditure once other appropriate/earmarked reserves have been fully utilised.

One of the most important principles used to prepare the MTFP is that council reserves and other one-off resources are not used to balance ongoing, base budget pressures: that all other mitigating actions are used before the use of one-off resources. Over the years, the Council's reserves have been used, for reasons such as to: cover the cost of one-off events not budgeted for; support and improve service delivery; and offset declining levels of income.

Members and officers are required to ensure the council operates as a going concern: that the council will continue to fulfil its functions for the foreseeable future. If this were not the case, for example, because of an imprudent use of council reserves, the Council's external auditors would be required to express a going concern opinion (GCO). A GCO would be the external auditor's way of expressing significant doubt on the Council's ability to operate longer-term.

**It is recommended that:**

- a) Reserves should be subject to an annual review by the Section 151 officer;
- b) Reserves should not be over-provided;
- c) Reserves should be used for the purpose for which they are provided (subject to a and b above)
- d) Reserves should not be used to support ongoing general fund expenditure (subject to recommendations a and b, above)

**Budgeting Principles**

The Council will prepare its budget in accordance with the following principles:

**Council Objectives:**

The purpose of the budget is to enable the Council to achieve its objectives, as set out in the Community Plan, and meet its statutory duties. In setting the budget and Council Tax, the Council will also have regard to Government requirements, including the Local Government Finance Settlement and the latest Comprehensive Spending Review.

**Balanced Budget:**

The Council is required to set a “balanced budget” with sources of funding identified to cover all expenditure proposed.

**Affordable Budget:**

In setting the budget, the Council will consider the affordability of proposals and their impact on the level of Council Tax.

**Inflation:**

The Council will have regard to the level of inflation when considering budget proposals. It may consider different indices of inflation for different purposes. For example, the retail prices index (RPI) and the consumer prices index (CPI) do not always reflect the rate of inflation faced by the Council and this may be better measured by specific indices such as those widely available for construction costs or energy.

**Sustainable Budget:**

The Council will set a budget to be sustainable over time. This will be reflected in the Council’s Medium Term Financial Plan and Capital Programme. The budget will include an overall risk assessment and will incorporate appropriate sensitivity analysis in order to ensure a robust final budget.

**Budget Demands:**

Any developments in the Council’s revenue and capital budgets will be required to go through the Council’s formal bidding process. Only those items approved as part of this will be included in the final budget.

**Use of 3<sup>rd</sup> Party Funding:**

Where third party funding is used to contribute towards the Council’s budgets, a plan is required to ensure that this element of the budget is sustainable if and when the 3<sup>rd</sup> party funding ceases. Where appropriate, an exit strategy is required.

**Adequate Reserves and Provisions:**

The Council aims to have adequate, but not excessive, reserves to cover unforeseen expenditure. Specific provisions are also in place to cover items of expenditure that are certain but where their timing is not known. Further details are set out in the policy on balances and reserves.

**Asset Management:**

The Council aims to manage its assets efficiently in accordance with best practice. Full details are set out in the approved Asset Management Plan.

**Council Tax Levels:**

In accordance with this policy, the Council aims to set the minimum level of Council Tax possible consistent with the achievement of its Aim and Priorities and other financial and service demands.

**Value for Money:**

The Council aims to achieve value for money in the provision of all of its services. This is set out in the Council's Value for Money Strategy.

**Risk Assessment:**

In accordance with section 25 of the Local Government Act 2104, the s151 officer will conduct an annual risk assessment of the robustness of the estimates made in the Council's budget.

**Sensitivity Analysis:**

The s151 officer will carry out a review of the impact of variations to key elements of the proposed budget (a "sensitivity analysis") on an annual basis.

**NEWARK AND SHERWOOD DISTRICT COUNCIL**

**CORPORATE CHARGING POLICY**

**Revised: July 2025**

**Date of next revision: July 2026**

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## **1. Introduction**

This Policy applies to external fees and charges other than those prescribed by the government. It provides a guide to internal charging arrangements but is subject to CIPFA's 'Service Reporting Code of Practice' and has regard to the Audit Commission's publication "*Positively Charged*".

It is not intended to apply to the disposal of Council assets, rents, internal charges or rechargeable works, nor will it apply where charges are governed by statutory regulation or guidance.

The Policy does apply if we have discretion, but not if there is a prescribed fixed charge.

Over the period of the Medium Term Financial Plan services will align their charges and processes with this policy.

This policy must be read in conjunction with the other related Council policies and strategies, including Financial Regulations, Equalities Policy, VFM Strategy, Corporate Plan.

If after reading this policy you require further guidance or clarification, or you are not sure how best to comply with the Policy then please contact your Business Manager or the Deputy Chief Executive and Director of Resources.

## **2. Purpose of the Policy**

To establish a policy within which fee and charge levels will support the Medium Term Financial Strategy and Community Plan; and,

To encourage a consistent approach to the setting and reviewing of charges for services provided by Newark and Sherwood District Council by:

- specifying the processes and frequencies for reviewing existing charging levels or introducing new charges for areas of the council's work for which charges could in principle be set;
- providing guidance on the factors that need to be taken into consideration when charges are reviewed on an annual basis;
- establishing parameters for calculating different levels of charges;
- recommending the criteria for applying concessions or discounted charges on a consistent council wide basis;
- requiring more active use of market intelligence relating to different services.

## **3. Processes and Frequencies for Reviewing Charges**

The following arrangements for reviewing charges will be applied throughout all areas of the Council where charges for services already exist or could in principle be set:

- all discretionary charges will be considered and approved by Council as part of the Budget and Council Tax setting process in March of each year.
- a major review of each business unit's charging strategy will take place at least once every three years to ensure consistency with the council's priorities, policy framework, service



aims, market sensitivity, customer preferences, and income generation needs, and the justification for any subsidy that the council as a whole makes to the service.

- annual reviews will be carried out for all of these services as part of the budget process, and shall have regard for the budget strategy approved each year.
- where fees are not to be increased or are proposed to be increased below inflation, this must be reported to SLT by the budget officer clearly stating the financial implications and budget shortfall before the deadline for completion of the revenue budget.
- these formal reviews will be overseen by the appropriate Director.
- where decisions on fees and charges, including any concessions or discounts, are taken outside the budget process approved by SLT and Cabinet, any proposals must have due regard to the Medium Term Financial Plan.

#### **4. Factors Relevant to the Annual Review of Charges**

Annual reviews of charges will consider the following factors:

- a. inflationary pressures generally and input costs specific to the service;
- b. any statutory framework relating to the service
- c. the actual or potential impact of any competition in terms of price or quality;
- d. trends in user demand and the forecast effect of price changes;
- e. equality and access to services;
- f. customer survey results;
- g. benchmarking results;
- h. council wide and service budget targets;
- i. cost structure implications arising from developments such as investments made in the service;
- j. consistency with other charges;
- k. alternative charging structures that could be more effective;
- l. validity of continuing any concessions;
- m. proposals for targeted promotions during the year, and evaluation of any that took place in the previous year;
- n. where less than the full cost is being recovered (including nil charges), the justification for the decision is reviewed and documented to ensure that this decision remains valid and that significant income is not being lost.

#### **5. Processes for Setting Charges for New Sources of Income**

All Business Managers should explore new business opportunities with a view to generating additional income.

All guidance in this Policy must be considered when setting new fees and charges.

A business plan must be prepared.

Any potential new income streams will need to be approved by SLT and Cabinet.

The setting of the fees and charges must be made in accordance with the current VAT regulations.

The proposed billing and recovery administrative process must be agreed with the S151 officer prior to the charges being implemented.

A central record will be maintained by the relevant Business Manager of any decisions made not to charge for a service where a charge could be made.

## **6. Calculation of Charges**

Charges will apply to all users, and will be set at a level to maximise take-up and income targets and wherever possible covering or exceeding the full cost of providing the service in question.

It is the responsibility of the relevant Business Manager to ensure that the proposals comply with the appropriate legal framework and any legal restrictions. Advice should be taken from the Council's Legal Business Unit before any proposal is finalised.

This calculation of full cost should be based on the direct cost of service provision including staff, supplies and services, equipment, premise costs. Overheads and capital asset depreciation charges should be included but consideration may be given to a less than full cost recovery of these elements where inclusion would distort competition.

Where less than the full cost is being recovered, the justification for the decision must be documented and retained by the appropriate Business Manager and clearly state the financial implications and budget shortfall.

All fees and charges must be calculated in accordance with the current VAT regulations.

## **7. Concessionary Charges**

In some circumstances the Council will offer subsidies to all users or concessions to specific user groups where this is consistent with achieving its priorities.

Entitlement to concessionary charges must have regard to equalities legislation and is designed to reduce barriers to participation arising from:

- Age;
- Level of income;
- Family circumstances;
- Health
- Educational circumstances.

Concessions will not apply to retail sales from shops or cafes.

Concessionary charges may also be made available to organisations whose purpose is to assist the Council in meeting specific objectives in its priorities and policy framework, or which contribute to the aims of key local partnerships in which the Council has a leading role.

Concessionary charges should not normally apply to peak times or in situations that would result in the loss of income from customers paying standard charges. Neither would they normally be available to organisations that are based outside of the Council's area other than on a reciprocal basis.

Only one concession can be applied to the standard charge at any given time.

Services wishing to adopt a concessionary charging scheme must demonstrate the scheme is practicable in terms of assessment, collection and evidencing for audit purposes.

## **8. Discounts**

For certain services it will be normal practice to set promotional discounts, frequent user discounts or group discounts.

Promotional discounts are defined as short-term charges that are targeted to increase take-up or awareness of the services that are available.

Frequent user discounts are to be used only for commercial reasons such as generating customer loyalty where alternative provision from competitors exists, and where market analysis shows a real risk of reduced income if they are not offered.

Group discounts are to be used to encourage take up by organisations able to block book and family discounts to encourage parents and children's take up.

Discounts can be applied to both the standard charge and the concessionary charge.

Discounts can only be applied where the Service has received prior approval of the principle to apply a discount to the charge for this service.

## **9. The Use of Market Intelligence**

All managers of discretionary services for which a charge is made should take steps to identify competitors offering similar or related services, and make use of comprehensive and dynamic market intelligence in evaluating:

- their charging strategy;
- the range of services provided;
- the quality of services provided;
- their cost structure.

All managers of services for which a charge is made should consult with customers, relevant partners and stakeholders on the range, quality and cost of services provided prior to the triennial review.

Consultation should also take place with potential customers and target groups to determine improvements needed to encourage participation at least every five years.

Comprehensive and accurate usage statistics will be maintained for all services and at all facilities where charges are made, to enable analysis of usage, justification of any subsidy given by the Council, and accurate forecasting of the effect of price changes on usage.

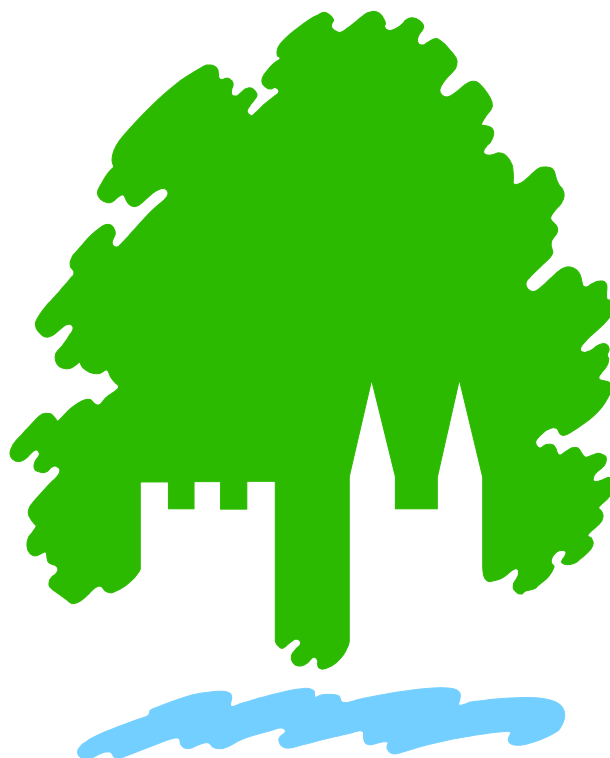
Benchmarking should be undertaken at least annually with other Councils in the local area and with relevant national groupings of authorities, to ensure that charges are at comparable levels and that significant differences are understood and justified.

**10. Further Guidance**

Charges should be payable in advance wherever possible or collected by direct debit or through the corporate income system.

All fees/charges must be reported annually to the Financial Services Business Unit as part of the budget process for publishing in the annual budget book.

All fees/charges must be published on the Council's website.



**NEWARK &  
SHERWOOD**  
*DISTRICT COUNCIL*

**Value for Money Strategy**

**Revised: July 2025**

**Next revision due: July 2026**

## Introduction

Newark & Sherwood District Council recognises its responsibility to achieve value for money from all its activities, however they may be funded.

The council is committed to the pursuit of economy, efficiency and effectiveness as part of its corporate strategy. It will seek to achieve value for money in the pursuit of its objectives and in the delivery of all services.

The council has a neutral position on service delivery methodologies. It will consider all service delivery options, including in-house provision, partnerships with other public sector organisations (including shared services), partnerships with private sector organisations, and bought in services as appropriate for individual services or groups of services.

In light of the current high inflation environment, it is inevitable that the annual revenue and capital budget setting will be challenging each year. The council has a range of methodologies in place to ensure that its aims and priorities are delivered within an acceptable level of council tax. The Value for Money Strategy is a key element of this process.

## Value for Money Principles

The principles involved in achieving value for money are:

- Efficiency: Considering the relationship between the amount of resources used (inputs) and the level of performance.
- Effectiveness: The ability to achieve stated goals or objectives, judged in terms of both output and impact.
- Economy: The acquisition or use of resources of an appropriate quality at minimum cost.

There are several aspects to be considered:

- Balancing effectiveness with efficiency
- Balancing efficiency with economy
- Sustaining the funding arrangement (where this is desirable)
- Demonstrating the most appropriate use of resources

Value for money can be defined as: **the use of available resources in an efficient and economical way to deliver effective services or achieve desired outcomes.**

The council is accountable for using resources efficiently to avoid wasting public funds, but this does not mean always seeking the lowest short-term cost. Waste occurs when a service – no matter how cheap or expensive – is ineffective. Effectiveness and efficiency needs to be balanced to achieve value for money.

The costs and benefits of each arrangement must be evaluated in terms of what the council seeks to achieve.

The council will manage any risks to its own interests, and use arrangements and processes such as monitoring, review and evaluation to demonstrate effectiveness and value for money.

At the planning stage, the council should be able to justify how it intends to apply its resources. After implementation it should be able to demonstrate that the policy is having the desired effects, and that the money is not going to waste. If there are unintended outcomes from its policies the council needs to adapt its funding arrangements to take them into account.

## **Objectives**

To achieve value for money, the council will:

- target resources towards achieving the council's objectives and meeting the needs of local people;
- integrate VFM principles within existing planning, management and review processes;
- adopt recognised good practice as appropriate;
- analyse potential budget issues for the following financial year at an early stage and take a corporate approach to developing solutions;
- ensure that VFM principles are taken into account during the commissioning process;
- benchmark activities against other similar activities and organisations where appropriate;
- respond to opportunities to enhance the economy, efficiency and effectiveness of activities;
- promote a culture of continuous improvement;
- demonstrate actively to both internal and external stakeholders that the achievement of VFM is sought in all activities undertaken;
- ensure that all staff recognise their continuing obligation to seek VFM for the council as part of their activities;
- seek external funding where appropriate to support the council's services if the external funding assists the achievement of the council's objectives.

## **Methodologies for achieving VFM**

The council has a number of different methodologies that contribute to the achievement of VFM.

These include:

- An annual refresh of the Community Plan focus' on the key objectives based on local need;
- development of Business Unit business plans which are referenced to the Community Plan objectives;
- resources are aligned, through the budget process including the refresh of the Medium Term Financial Plan, with the key objectives as set out in the Community Plan;
- effective use of ICT (supported by the ICT Digital Strategy);
- service reviews;
- scrutiny by Policy and Performance Improvement Committee;
- scrutiny by the Audit & Governance Committee through Internal Audit reports;
- corporate procurement mechanisms (supported by the Contract Procedure Rules and external providers Welland Procurement);
- partnership working including consideration of shared services and public/private partnerships;
- customer feedback.

## **How the Council monitors the achievement of VFM**

The Council sets a range of performance indicators for key activities in order to monitor the effectiveness of those functions. Each of these are built into Business Unit business plans and are referenced to objectives set within the Community Plan. These are reported through the Senior Leadership Team and on to Members for their scrutiny.

## **Responsibility for delivering VFM**

The council is required to satisfy itself that VFM is being sought and achieved from the use of public funds.

The responsibility for achieving VFM lies with all Members and staff and is not restricted to those with resource or financial responsibilities. All Members and staff should endeavour to seek and achieve VFM in all activities and to bring to management's attention any opportunities for improvement.

Business Managers have the responsibility to maintain an awareness of good practices in their own area of operation and ensure that these are followed appropriately.

The Senior Leadership Team will provide a corporate overview of VFM to ensure that initiatives are not restricted to individual service areas.

The Council has an expectation that bodies with which the Council has partnership arrangements and organisations in receipt of grant aid from the council will follow VFM guidelines.



**NEWARK & SHERWOOD DISTRICT COUNCIL**

**CAPITAL PROGRAMME 2026/27 – 2029/2030 PRIORITISATION SCHEME**

	<b>STAGE 1 FACTOR</b>	<b>Comments</b>	<b>STAGE 2 DETAILED PRIORITISATION</b>	<b>STAGE 2 WEIGHTING</b>
1	<b>Key Priorities</b> Scheme must link to at least one of the Council's priorities and be an objective contained within a Service Plan.	If a scheme does not clearly relate to these areas it will not be considered further.	Each scheme to be marked as to how well it fits with the Community Plan	<b>35%</b>
2	<b>Evidence of Need</b> Service Strategy National Strategy or Guidelines Statutory Obligation	In some cases local demands are in excess of national guidelines and strategies and this tries to acknowledge that the two must be balanced. This will cover Health and Safety related schemes.	The following factors will receive equal weighting :- <ul style="list-style-type: none"> <li>• Statutory Obligation</li> <li>• National Strategy</li> <li>• Validity of consultation in relation to project. e.g. How specific to this project? Who was consulted, was this comprehensive?</li> <li>• Quality of evidence of need for project .e.g. size of sample base, date of evidence, format of evidence</li> </ul>	<b>10%</b>
3	<b>Partnership</b> Eligibility under existing criteria can be demonstrated.	Show that work has been done to ensure that the obtaining of external finance is realistic. The degree to which the partnership will add value to the project.	The proportion of finance which will be met by third party. The likelihood of receiving support. Assessment of the value the partner will add to the project.	<b>15%</b>

4	<b>Outputs and Outcomes</b> These have been clearly identified and can be justified from supporting evidence. Specific comments should be made as to how the scheme represents value for money when compared to other options	This will enable the council to improve the way it reports its work and clearly show what is being achieved. The comments should refer to any performance indicators which the proposal is addressing specifying what the improvement target is.	Assessment then made on what the scheme will achieve.	<b>15%</b> Assessment of all factors or group of factors
5	<b>Financial</b> Capital costs have been based on internal or external professional advice Revenue implications have been properly developed	Capital costs include both works and land purchase and cover all associated costs. Try and avoid “guesstimates” which result in schemes requiring increased finance or having to be reduced to meet finance available.	<u>Capital</u> will be based on the quality of work which has been put into estimate. e.g. costed feasibility studies. <u>Revenue</u> will be based on whether the effect is positive, neutral or negative on the revenue budget. Positive effect scores 10 Neutral effect scores 3 Negative effect scores 0	<b>5%</b>  <b>10%</b>
6	<b>Risk Assessment</b> Identify the level of risk in a project not being able to proceed. For example planning appeals, listed building consent. Over subscription of partnership funds	Try and ensure that not all schemes selected are high risk with the danger that there will be delays in delivery or no-delivery.	The following will all need to be considered:- Technical Issues Financial Uncertainty Partnership uncertainty Planning Issues Legal issues Timescale	<b>10%</b>



Report to: Policy & Performance Improvement Committee – 30 June 2025

Director Lead: Sanjiv Kohli – Deputy Chief Executive and Director - Resources

Lead Officer: Nick Wilson, Business Manager – Financial Services

Report Summary	
<b>Report Title</b>	Provisional Financial Outturn Report to 31 March 2025
<b>Purpose of Report</b>	<p>To present to Members the provisional 2024/25 financial outturn position on the Council's revenue and capital budgets, including:-</p> <ul style="list-style-type: none"> <li>• General Fund Revenue</li> <li>• Housing Revenue Account</li> <li>• Capital Programme</li> <li>• Provisions and Impaired Estimates on Debtors</li> <li>• Usable Reserves</li> <li>• Collection Fund</li> </ul> <p>This report provides Members with a summary of actual income and expenditure compared to the revised budget and how any surpluses/deficits have been allocated to/from reserves.</p>
<b>Recommendations</b>	<p>That the final outturn of revenue and capital spending for 2024/25 be noted;</p> <p>That the capital financing proposals as set out in table 5 at paragraph 1.19 are noted;</p> <p>Capital Programme reprofiling of £7.817m carried forward into 2025/26 as per appendices E and F be noted;</p> <p>That the movement in Provisions and Impaired Estimates on Debtors be noted;</p> <p>That the creation of the new reserve, as outlined in paragraph 1.28, be approved; and</p>

	That the individual contributions to, and withdrawals from, the revenue and capital Usable Reserves be noted.
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## 1.0 Background

### Overview of Provisional General Fund (GF) Revenue Outturn for 2024/25

- 1.1 The accounts show a favourable variance of £1.744m on service budgets, with a total favourable variance of £3.384m as follows:-

*Table 1: General Fund Revenue Outturn for 2024/25 Financial Year as at 31 March 2025*

	Budget £'m	Outturn £'m	Variance £'m
Climate and the Environment	2.990	2.369	(0.621)
Health, Wellbeing and Leisure	1.413	0.446	(0.967)
Heritage, Culture and the Arts	0.887	0.593	(0.294)
Housing	0.439	0.545	0.106
Public Protection and Community Relations	2.847	2.721	(0.126)
Strategy, Performance and Finance	8.509	8.600	0.091
Sustainable Economic Development	1.958	2.025	0.067
<b>Net Cost of Services</b>	<b>19.043</b>	<b>17.299</b>	<b>(1.744)</b>
Other Operating Expenditure	4.814	4.734	(0.080)
Finance & Investment Income & Expenditure	(1.760)	(1.707)	0.053
Taxation & Non Specific Grant Inc	(24.335)	(25.847)	(1.512)
<b>Net Cost of Council Expenditure</b>	<b>(2.238)</b>	<b>(5.521)</b>	<b>(3.283)</b>
Transfer to/(from) Unusable Reserves	2.784	2.683	(0.101)
Transfer to/(from) Usable Reserves	(0.546)	2.838	3.384
Transfer to/(from) General Balance	0.000	0.000	0.000

- 1.2 Based on the table above, usable reserves have increased by £3.384m. This increase has been applied to a number of different reserves described at paragraphs 1.25 and 1.26 later in this report. The statutory General Fund balance has not varied during the year and remains at £1.500m, which is in accordance with the Medium-Term Financial Plan approved on 6 March 2025.
- 1.3 The table below shows further detail regarding the variances which make up the additional transfer of £3.384m into Usable Reserves:-

Reason for Variance	Value £'m
Reduction in need for Active4today management fee, £0.587m, mainly due to reduction in utility costs. VAT refund received in year, £0.155m, in respect of non-business vat sporting claim.	(0.742)

Government enacted the Bellwin scheme during 2024/25 enabling the Council to claim for flooding costs from storm Babet and Henk incurred during 2023/24.	(0.095)
Prices of Petrol & Diesel have stabilised since the budget setting for 2024/25 resulting in a favourable outturn variance	(0.093)
Additional net income generated at the Palace Theatre.	(0.153)
Favourable variance on electricity and gas costs across corporate Council buildings due to stabilisation of prices compared to the forecast price increase at budget setting for 2024/25.	(0.352)
The admin grant for localised council tax support is no longer paid separately by the Government and has now been rolled into the revenue support grant.	0.096
Unfavourable income variance from planning applications is attributed to a decline in major submissions, driven by continued market caution influenced by ongoing external factors.	0.208
Over achievement in income on the waste and recycling department which includes glass collection, trade waste and garden waste.	(0.274)
Additional recharges to the HRA due to increase on the demand for vehicle repairs due to the aging fleet.	(0.057)
Net favourable variance on private sector speech call mainly due to increase in customer base regarding the transfer of customers from Mansfield District Council.	(0.047)
Other Variances.	(0.235)
<b>Favourable variance on services</b>	<b>(1.744)</b>
Release of bad debt provision, £0.096m, and the net variance on apprentice levy and corporate contingency.	(0.111)
Net variance on interest receivable and payable.	0.084
Additional income from the Nottinghamshire Business Rates Pool.	(0.773)
Redistribution of the Nottinghamshire Business Rates Pool volatility funding.	(0.860)
Reduction in Minimum Revenue Provision due to Bowbridge Road Carpark scheme not being complete by 31 <sup>st</sup> March 2024.	(0.101)
Reduction in Internal Drainage Board grant received in year compared with budgeted level.	0.121
<b>Additional transfer to Usable reserves</b>	<b>3.384</b>

- 1.4 Further details of the favourable variance on Service Budgets managed by the Business Managers of £1.744m against directorate budgets are in **Appendix A**.
- 1.5 Net Interest receivable had an unfavourable variance of £0.084m due to the timing of treasury transactions throughout the year and a reduction in charge to the HRA due to the timing of borrowing incurred by the HRA.
- 1.6 Business Rates amounted to £1.633m over the anticipated budgeted figure. £0.860m of this related to the redistribution of monies held by the Pool in relation to the County wide volatility fund, which was held to mitigate authorities going into a safety net position. As the fund hadn't been used for a number of years, and authorities unlikely to need to access this funding, it was felt it would be best utilised at each authority, rather than

being held centrally. The remaining £0.773m, £0.511m was additional returned funding from the Nottinghamshire Business Rates Pool generated from growth within Newark and Sherwood's Business Rates base, £0.031m was returned from Central Government based on a surplus generated on the national levy account and £0.231m as additional grant funding from central government based on decisions regarding Business Rates billing meaning that the Council cannot invoice/reduced invoices to certain businesses hence Government compensates the Council for this.

- 1.7 The Council received £0.121m less in grant funding compared with budget (and previous year actual for which the budget was based upon) in relation to Internal Drainage Board (IDB) levies. The Council had received, during 2023/24, £0.238m in relation to the increase in levy cost over recent years due to the impact of the cost of utilities at the IDB's together with the number of flooding incidents the IDB's need to respond to.

**Final position (as at 31 March 2025) compared to previous position (as at 31 December 2024)**

- 1.8 The previous budget monitoring report to Cabinet projected a favourable variance against the revised budget of £1.023m on Service budgets. This report describes the actual favourable variance, against the revised budget, of £1.744m on Service budgets: an increase of £0.721m. *Table 2* summarises the changes in variance against committee budgets between the two reports. Further details of these changes by Portfolio are in **Appendix B**.

**Table 2: General Fund Revenue Outturn: Changes in Variance by Committee Between Reports**

<b>Net Cost of Services variance as at 31/12/2024 (11/03/2025 Cabinet report)</b>	<b>(1.023)</b>
Climate and the Environment	(0.244)
Health, Wellbeing and Leisure	(0.134)
Heritage, Culture and the Arts	(0.049)
Housing	(0.092)
Public Protection and Community Relations	0.004
Strategy, Performance and Finance	(0.190)
Sustainable Economic Development	(0.016)
<b>Net Cost of Services variance as at 31/03/2025 (08/07/2025 Cabinet report)</b>	<b>(1.744)</b>

**Carry Forwards**

- 1.9 Previous years have seen officers requesting carry forwards of underspends that relate to the timing of payments that have extended past the year-end date of 31<sup>st</sup> March in year. This year, the s151 Officer has approved £0.700m to be carried forward into 2025/26.
- 1.10 Any unspent conditional grants are dealt with separately and are transferred to the balance sheet for either repayment or expenditure in the following year dependent upon its terms and conditions.

## Overview of Provisional Housing Revenue Account (HRA) Outturn for 2024/25

- 1.11 The financial outturn position to 31 March 2025 for the HRA before appropriations to reserves is a surplus of £0.978m. *Table 3* summarises these variances.

*Table 3: HRA Revenue Outturn for 2024/25 Financial Year as at 31 March 2025*

1.12		Budget £'m	Outturn £'m	Variance £'m
	Expenditure	28.225	27.692	(0.533)
	Income	(30.255)	(30.324)	(0.069)
	<b>Net Cost of HRA Services</b>	<b>(2.030)</b>	<b>(2.632)</b>	<b>(0.602)</b>
	Other Operating Expenditure	(0.006)	0.181	0.187
	Finance & Investment Income/Expenditure	4.070	3.525	(0.545)
	Taxation & Non Specific Grant Income	(1.512)	(1.530)	(0.018)
	<b>(Surplus)/Deficit on HRA Services</b>	<b>0.522</b>	<b>(0.456)</b>	<b>(0.978)</b>
	<b>Movements in Reserves</b>			
	Transfer to/(from) Usable Reserves	0.709	1.687	0.978
	Transfer to/(from) Unusable Reserves	(11.200)	(11.200)	0
	Transfer to Major Repairs Reserve - Depreciation	6.388	5.859	(0.529)
	Transfer to Major Repairs Reserve – Revenue Contribution	3.581	4.110	0.529
	<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>

Further details of the variances against HRA budgets are in **Appendix C**.

- 1.13 Further details of the changes in variance between this report and the previous report are in **Appendix D**.

## Overview of Provisional Capital Outturn for 2024/25

- 1.14 Capital monies are spent on building or enhancing the Council's asset base. There are rules and regulations regarding what can be classed as capital expenditure, and this spend must be financed separately from the day to day running costs of the Council.
- 1.15 Members approve all variations to the Capital Programme. At its meeting on 11 March 2025, Cabinet approved the revised budget of £42.121m. Further variations reduced the budget by £0.406m to a final amount of £41.716m. This has been included in the detail at **Appendix E**.
- 1.16 The accounts show actual expenditure of £32.936m, resulting in of £8.780m or 21% of the revised budget. Some slippage in capital schemes is expected at the end of the financial year as timing of expenditure changes. To ensure the overall project budget remains intact, it is proposed that reprofiling of £7.817m (£4.812m GF and £3.004m HRA) to 2025/26 as detailed in **Appendices E and F**. This is because there are commitments in

place or schemes still expected to start. For clarity, where a scheme has been completed, any remaining budgets will not be carried forward.

Table 4: GF and HRA Capital Outturn for 2024/25 Financial Year as at 31 March 2025

Spend Type	Budget Approved as per Cabinet 11/3/25 £'m	Revised Post Cabinet £'m	Outturn £'m	Variance £'m
GF	15.605	15.191	9.715	(5.476)
GF REFCUS*	5.595	5.604	5.346	(0.258)
<b>GF Total</b>	<b>21.200</b>	<b>20.795</b>	<b>15.060</b>	<b>(5.734)</b>
HRA	20.824	20.824	17.778	(3.045)
HRA REFCUS*	0.098	0.098	0.098	0.000
<b>HRA Total</b>	<b>20.921</b>	<b>20.921</b>	<b>17.876</b>	<b>(3.045)</b>
<b>GF and HRA Total</b>	<b>42.121</b>	<b>41.716</b>	<b>32.936</b>	<b>(8.780)</b>

\*REFCUS relates to Revenue Expenditure funded from Capital under Statute i.e. expenditure on non-Council-owned assets e.g. disabled facilities grants.

- 1.17 The GF variance of £5.734m is comprised of £4.812m of carry forward requests, and favourable variances of £0.922m. Further details are in **Appendix E**.
- 1.18 The HRA variance of £3.045m is comprised of £3.004m of carry forward requests and favourable variances of £0.041m. Further details are in **Appendix F**.
- 1.19 Total Capital spend in the year of £32.936m has been financed by a combination of borrowing, external grants and contributions, receipts, major repairs reserve and revenue contributions. It is proposed that Cabinet approve the revised capital financing proposals as summarised in *Table 5*:

Table 5: Proposed 2024/25 GF and HRA Capital Outturn Financing

Source of Financing	GF Programme £'m	HRA Programme £'m	Total £'m
External Grants & Contributions	8.189	1.513	<b>9.702</b>
Capital Receipts	1.642	0.300	<b>1.942</b>
Community Infrastructure Levy	0.031	0.000	<b>0.031</b>
Revenue Contributions	1.984	4.454	<b>6.438</b>
Borrowing	3.214	11.609	<b>14.823</b>
<b>Total Financing</b>	<b>15.060</b>	<b>17.876</b>	<b>32.936</b>

\*Revenue contribution includes £1.757m transfers from reserves and £0.227m in year revenue contributions.



## Provisions for Future Liabilities

- 1.20 Provisions are made when an event has taken place that gives the Council an obligation that probably requires settlement, can be reasonably estimated, but where the timing of the payment is uncertain. Good practice requires that any movements in a Provision should be approved separately by Cabinet. The provisions in the table below relate to alterations and appeals against the rateable values (RV) provided for on properties in the National Non-Domestic Rating list (NNDR). The amounts shown in the Statement of Accounts (and hence in the table below) relate to this Council's element for the provision for appeals. 2023/24 saw the release of a refreshed rating list from the valuation office. This is the third such list since rates retention came into effect in April 2013. As a result of the new list being released, from April 2023 no further appeals for the prior lists are able to be lodged, this in turn has resulted in lower threats to our rating income. During the year 2024/25, £0.616m was charged against the provision in due to RV adjustments in relation to the 2017 and 2023 rating lists and £0.720m was added to the provision (£0.107m was added for the 2017 list provision and £0.613m was added for the 2023 list provision). 40% of all provisions are applicable to NSDC (£0.246m charge and £0.288m increase therefore £0.042m as the NSDC share). The provisions provided for in *Table 6* are the Council's 40% share, as follows:

*Table 6: 2024/25 Movements in GF Provision – NNDR*

<b>General Fund Provision (NNDR) – Period of Settlement for Appeals</b>	<b>Balance B/Fwd 01/04/2024 £'m</b>	<b>Movement in Year £'m</b>	<b>Actual Balance 31/03/2025 £'m</b>
Provision for Appeals – NNDR settled within 12 months	(0.202)	(0.102)	(0.304)
Provision for Appeals – NNDR settled after 12 months	(0.377)	0.060	(0.317)
<b>Provision for Appeals – NNDR Total</b>	<b>(0.579)</b>	<b>(0.042)</b>	<b>(0.621)</b>

- 1.21 The Council receive external advice (from Analyse Local) relating to the level of provision that should be held. Analyse Local have used their knowledge and understanding from a national perspective to estimate the total liability for the 2017 list which amounts to £0.203m and a total liability for the 2023 list amounting to £1.323m. This gives a total provision at Collection Fund level of £1.553m of which this Council recognises 40% (£0.621m) due to its share of the overall NNDR income.

## Impaired Estimates on Debtors

- 1.22 Impaired Estimates on Debtors is an estimation of the amount that will remain uncollectable after a certain time period and may require write off in the future accounts of the Council. The calculation is based upon on the age and amounts of debt owed to the Council based on a hierarchical percentage i.e. the older the debt, the greater likelihood of non-collection. Good practice requires that movements in the Impaired Estimates on Debtors should be approved separately by Members. *Table 7* details these:

*Table 7: 2024/25 Movements in GF and HRA Impaired Estimates on Debtors*

Debtor Type	Balance B/Fwd 01/04/2024 £'m	Write Offs in Year £'m	(Increase) / Decrease in Provision £'m	Actual Balance 31/03/2025 £'m
GF - Sundry Debts	(0.165)	0.004	0.036	(0.125)
GF - Housing Benefit	(1.001)	0.123	0.060	(0.818)
<b>GF – Impaired Estimates on Debtors</b>	<b>(1.166)</b>	<b>0.127</b>	<b>0.096</b>	<b>(0.943)</b>
HRA - Sundry and Other Debts	(0.019)	0.020	(0.016)	(0.015)
HRA - Former Tenants	(0.293)	0.043	(0.135)	(0.385)
HRA - Current Tenants	(0.055)	0.004	(0.040)	(0.091)
<b>HRA – Impaired Estimates on Debtors</b>	<b>(0.367)</b>	<b>0.067</b>	<b>(0.191)</b>	<b>(0.491)</b>

### Usable Capital Reserves

1.23 A Reserve is created for a specific future purpose or to cover contingencies. In accordance with the Code; these Usable Reserves must be separately identified between those that are retained for Capital purposes and those that are retained for Revenue purposes. Again, good practice dictates that any movements in existing reserves, or the creation of any new reserves, be approved by Members.

1.24 Capital reserves are used to fund spend incurred on the approved capital programme. *Table 8* details the position as at 31 March 2025:

*Table 8: Capital Reserves used to Fund GF and HRA Capital Programmes as at 31 March 2025*

Capital – Type of Reserve Used to Fund Capital Programme	Balance B/Fwd 01/04/2024 £'m	Cont'n in Year £'m	Use in Year £'m	Actual Balance 31/03/2025 £'m	Anticipated balance at 31/03/2029 £'m
<b>Capital - GF</b>					
Usable Capital Receipts	0.039	2.805	1.643	1.201	0.038
Capital Grants Unapplied	11.157	2.261	0.031	13.387	13.387
<b>Capital – HRA</b>					
Usable Capital Receipts – HRA	0.120	0.219	0.304	0.035	0.512
Usable Capital Receipts - RTB's	0	0.359	0.300	0.059	0.889
Capital Grants Unapplied	0	0.271	0.271	0	0
Major Repairs Reserve (MRR)	8.025	9.969	7.492	10.502	5.277
<b>Capital - Total</b>	<b>19.341</b>	<b>15.884</b>	<b>10.041</b>	<b>25.184</b>	<b>20.103</b>

## Usable Revenue Reserves

- 1.25 Revenue reserves are used to fund anything that is not capital in nature, albeit can be applied to capital expenditure if necessary. They cover such areas as donations, external grants and contributions for future service provision, or specific sums of money held for a specific purpose. The tables below show high level balances against the categories of the reserves that are held for each fund together with current approved commitments and hence a forecast balance. **Appendix G** details the movement on General Fund Reserves and **Appendix H** shows HRA Reserves.

General Fund	Opening Balance £'m	Closing Balance £'m	Commitments £'m	Forecast Balance £'m
Budget funding reserve	(9.838)	(9.012)	5.696	(3.316)
Earmarked for Known Pressure	(7.288)	(8.761)	3.166	(5.595)
Ringfenced	(2.037)	(2.555)	0.265	(2.290)
Un-ringfenced	(13.486)	(15.286)	11.417	(3.869)
<b>Total</b>	<b>(32.649)</b>	<b>(35.614)</b>	<b>20.544</b>	<b>(15.070)</b>

- 1.26 Overall the Council has increased its General Fund reserves position by £2.965m. This is attributed to:

	£'m
<b>Brought Forward Reserves balance</b>	<b>32.649</b>
Budgeted increase in reserves	0.794
Contributions to Capital Expenditure	(1.757)
Favourable variance in cost of running Council	3.384
Other movements	0.544
<b>Reserves balance as at 31<sup>st</sup> March 2025</b>	<b>35.614</b>

HRA	Opening Balance £'m	Closing Balance £'m	Commitments £'m	Forecast Balance £'m
Earmarked for Known Pressure	(4.227)	(5.652)	1.806	(3.846)
Un-ringfenced	(2.000)	(2.000)	0.000	(2.000)
<b>Total</b>	<b>(6.227)</b>	<b>(7.652)</b>	<b>1.806</b>	<b>(5.846)</b>

- 1.27 Service variances combined with non-service related income and expenditure variances has meant that overall the District Council has increased its Housing Revenue Account reserves by £1.427m. This increase has been identified as being related to:

	£'m
<b>Brought Forward Reserves balance</b>	<b>6.227</b>
HRA agreed Carry Forwards	0.233
Unused efficiency savings	0.348
Favourable variance in cost of running HRA	0.978
Other movements	(0.132)
<b>Reserves balance as at 31<sup>st</sup> March 2025</b>	<b>7.654</b>

1.28 During the year one new General Fund reserve has been set up:

Reserve name	Balance as at 31 Mar 2025 £'m	Purpose
Residential Food Waste	(0.260)	Funding has been received from DEFRA under the New Burdens scheme to support the delivery of containers and project management for the implementation of residential food waste collections.

#### **The Collection Fund 2024/25**

- 1.29 The Collection Fund accounts for the income from the collection of Council Taxes and Business Rates, and the subsequent disbursement to local authority preceptors and central government.
- 1.30 The in-year surplus on the Council Tax account was £0.061m, which reduced the overall deficit from £1.324m at 1 April 2024 to £1.263m at 31 March 2025.
- 1.31 The Code prescribes that the Statement of Accounts only show the element of Council Tax that relates to Newark & Sherwood District Council. In this regard, the share of the Council Tax deficit of £1.263m that relates to Newark & Sherwood District Council as at 31 March 2025 is £0.147m. A deficit of £1.500m was estimated during January 2025 and is therefore being recouped during 2025/26 from Council Tax preceptors. £0.174m of this related to Newark & Sherwood DC and has been budgeted for accordingly.
- 1.32 The in-year deficit on the Business Rates account was £1.303m, which reduced the overall surplus from £1.997m at 1 April 2024 to £0.694m at 31 March 2025.
- 1.33 The Code prescribes that the Statement of Accounts only show the element of business rates that relates to Newark & Sherwood District Council. In this regard, the share of the business rates surplus that relates to Newark & Sherwood District Council as at 31 March 2025 is £0.277m. The Council declared an estimated surplus as at 31<sup>st</sup> March 2025 of £0.631m during January and hence £0.252m has been included within the 2025/26 budget.

- 1.34 Impaired provisions on council tax and business rates debtors is an estimation of the amount that will remain uncollectable after a certain time period. This may be required to be written off in future by all preceptors depending on their share of the Collection Fund. The calculation is based upon on a historical experience of bad debt, i.e. experience shows 0.8% of net liability is written off for council tax, 0.7% for business rates. Where a debt is written off, for every £1.00 in council tax, £0.11p is reflected in the Councils accounts, the remaining balance is split between the remaining preceptors. For every £1.00 of business rates written off, £0.40 is reflected in the Councils accounts.

2024/25 Movements in CF Impaired Estimates on Debtors

Debtor Type	Balance B/Fwd 01/04/2024 £'m	Write Offs in Year £'m	(Increase) / Decrease in Provision	Actual Balance 31/03/2025 £'m
CF - Council Tax Debts	(3.861)	0.803	(0.729)	(3.787)
CF - Business Rates Debts	(0.704)	0.231	(0.392)	(0.865)
<b>CF – Impaired Estimates on Debtors</b>	<b>(4.565)</b>	<b>1.034</b>	<b>(1.121)</b>	<b>(4.652)</b>

**Pensions**

- 1.35 The details regarding the Council's share of the Nottinghamshire County Council Pension Fund are provided for Members consideration at **Appendix I**.
- 1.36 Barnett Waddingham are the Pension Fund's appointed Actuary and their report sets out the assumptions used to prepare the IAS19 pension figures reported in the Council's accounts. It is best practice to consider these assumptions prior to agreeing their use and inclusion in the Statement of Accounts for 2024/25. The Audit & Governance Committee considered these at their meeting in April 2025.

**2.0 Proposal/Options Considered and Reasons for Recommendation**

- 2.1 To approve the Financial Outturn position for the Council for the 2024/25 financial year.

**3.0 Implications**

- 3.1 In writing this report and in putting forward recommendations officers have considered the following implications; Data Protection, Digital and Cyber Security, Equality and Diversity, Financial, Human Resources, Human Rights, Legal, Safeguarding and Sustainability, and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

**Background Papers and Published Documents**

Statement of Accounts files & working papers 2024/25

Capital Finance Account's 2024/25 files

Housing Revenue Account's 2024/25 files

**General Fund (GF) Revenue Outturn Variance Analysis by Portfolio and Business Unit as at 31March 2025**

Favourable variances are bracketed and in red - £(0.000)m. Unfavourable variances are in black - £0.000m. All amounts are in millions of pounds (£'m).

<b>Climate and the Environment - £(0.621)m</b>		<b>£'m</b>
Climate Change	Local energy area plan saving from budget not required as Major of East Midlands is now paying for the work required.	(0.056)
Environmental Services	Salaries underspends across various services within the Business Unit.	(0.232)
Environmental Services	Prices of Petrol & Diesel have stabilised since the Budget Setting for 24.25.	(0.093)
Environmental Services	Over achievement in income on the waste and recycling department which includes glass collection, trade waste and garden waste.	(0.274)
Environmental Services	Sewerage works services to be recovered from the relevant residents	(0.042)
Environmental Services	Additional recharges to the HRA due to increase on the demand for vehicle repairs due to the aging fleet.	(0.057)
All	Vacancy Factor	0.200
All	Culmination of other Employee favourable variances across the Portfolio	(0.007)
All	Other Small Variances	(0.060)
<b>Climate and the Environment Total</b>		<b>(0.621)</b>

<b>Health, Wellbeing and Leisure - £(0.967)m</b>		<b>£'m</b>
Housing Strategy & Development	Reduction in anticipated A4T Management fee due to revised utility costs within the leisure centres and a reduction in associated irrecoverable VAT paid.	(0.587)
Housing Strategy & Development	Successful leisure grant received for a contribution towards the increase in utility costs during the spike in prices.	(0.174)
Housing Strategy & Development	Successful VAT refund claim in respect of non-business VAT sporting claim	(0.155)
Housing Strategy & Development	Salaries underspends across various services within the Business Unit.	(0.060)
All	Vacancy Factor	0.025
All	Culmination of other Employee favourable variances across the Portfolio	(0.013)
All	Other Small Variances	(0.003)
<b>Health, Wellbeing and Leisure Total</b>		<b>(0.967)</b>

<b>Heritage, Culture, and the Arts - £(0.294)m</b>		<b>£'m</b>
Heritage & Culture	Additional net income generated at the Palace Theatre	(0.153)
Heritage & Culture	Additional net income generated at the National Civil War Centre and Newark Museum	(0.033)
Heritage & Culture	Salaries underspends across various services within the Business Unit.	(0.028)
Economic Growth & Visitor Economy	Salaries underspends across various services within the Business Unit.	(0.042)
All	Vacancy Factor	0.052
All	Culmination of other Employee favourable variances across the Portfolio	(0.003)
All	Other Small Variances	(0.087)
<b>Heritage, Culture, and the Arts Total</b>		<b>(0.294)</b>

<b>Housing - £0.106m</b>		<b>£'m</b>
Housing & Estates Management	A reduction in the numbers coming through the resettlement schemes.	0.143
Housing Strategy and Development	Unfavourable variance on the recharge to HRA due to the calculation including a portion of salaries and there is vacancies within the business unit.	0.070
Housing Strategy and Development	Net favourable variance on private sector speech call mainly due to increase in customer base regarding the transfer of customers from Mansfield District Council	(0.047)
All	Vacancy Factor	0.057
All	Culmination of other Employee favourable variances across the Portfolio	(0.116)
All	Other Small Variances	(0.001)
<b>Housing Total</b>		<b>0.106</b>

<b>Public Protection and Community Relations - £(0.126)m</b>		<b>£'m</b>
Public Protection	Government have now enacted the Bellwin scheme which has enabled the Council to claim for flooding costs from storm Babet and Henk.	(0.095)
Public Protection	Salaries underspends across various services within the Business Unit.	(0.128)
Environmental Services	Salaries underspends across various services within the Business Unit.	(0.054)
All	Vacancy Factor	0.136
All	Culmination of other Employee favourable variances across the Portfolio	(0.009)
All	Other Small Variances	0.024
<b>Public Protection and Community Relations Total</b>		<b>(0.126)</b>

**General Fund (GF) Revenue Outturn Variance Analysis by Portfolio and Business Unit as at 31March 2025**

Favourable variances are bracketed and in red - £(0.000)m. Unfavourable variances are in black - £0.000m. All amounts are in millions of pounds (£'m).

<b>Strategy, Performance and Finance - £0.091m</b>		<b>£'m</b>
Customer Services	Salary underspend due to a number vacancies and maternity leave within the team.	(0.130)
Admin Services	Salary underspend due to vacancies in the team.	(0.088)
Legal and Democratic Services	Agency staff utilised due to previous vacancies	0.056
Corporate Property	Additional costs over budget for the outsourcing of legal fees	0.038
Corporate Property	Car Parking services - Additional income forecast relating to all the car park and 10 car parking spaces for McDonalds, London Rd	(0.110)
Corporate Property	Reduction on income generated from the Lorry Park due to the continued impact on surface condition and reputation from previous flooding.	0.047
Corporate Property	Favourable variance on electricity and gas costs across corporate Council buildings due to stabilisation of prices compared to the forecast price increase at budget setting for 2024/25.	(0.322)
Revenues & Benefits	Revenues - Apprentice vacant post no recruitment expected and an additional post vacant for a period of time.	(0.079)
Revenues & Benefits	The admin grant for localised council tax support is no longer paid separately by the Government and has now been rolled into the revenue support grant.	0.096
All	A significant portion of HRA recharge calculations are based on departmental staffing levels, substantial staffing vacancies result in lower actual recharges.	0.409
All	Vacancy Factor	0.453
All	Culmination of other Employee favourable variances across the Portfolio	(0.246)
All	Other Small Variances	(0.033)
<b>Strategy, Performance and Finance Total</b>		<b>0.091</b>
<b>Sustainable Economic Development - £0.067m</b>		<b>£'m</b>
Planning Development	Favourable variance forecast on salaries in the Development Management department due to vacancies and timing difference on new posts starting, partly offset by increase in agency costs.	(0.074)
Planning Development	Unfavourable income variance from planning applications is attributed to a decline in major submissions, driven by continued market caution influenced by ongoing external factors.	0.208
Planning Development	Costs are being incurred in relation to Nationally Significant Infrastructure Projects (NSIPS), some of these are able to be recovered from developers.	(0.080)
All	Vacancy Factor	0.130
All	Culmination of other Employee favourable variances across the Portfolio	(0.111)
All	Other Small Variances	(0.006)
<b>Sustainable Economic Development Total</b>		<b>0.067</b>
<b>General Fund Revenue Outturn Variance for Services</b>		<b>(1.744)</b>



**General Fund (GF) Revenue Outturn Change in Variance Analysis by Portfolio between 31 December 2024 and 31 March 2025.**

Favourable variances are bracketed and in red - £(0.000)m. Unfavourable variances are in black - £0.000m.  
All amounts are in millions of pounds (£'m)

<b>Climate and the Environment - Variance as at 31/12/2024</b>	<b>(0.377)</b>
Glass Income exceeds expectations and value of the sale of glass has increased.	(0.026)
Income over and above Q3 forecast for collection of bulky waste items and refuse bin replacement	(0.024)
Sewerage works services to be recovered from the relevant residents	(0.035)
Additional recharges to the HRA due to increase on the demand for vehicle repairs due to the aging fleet.	(0.043)
Further Vacancies such as Mechanics, Environmental Health Programme Officer, and restructured New Posts and the general timings of the recruitment process.	(0.036)
Other small variances	(0.080)
<b>Climate and the Environment - Variance as at 31/03/2025</b>	<b>(0.621)</b>

<b>Health, Wellbeing and Leisure - Variance as at 31/12/2024</b>	<b>(0.833)</b>
Successful leisure grant received for a contribution towards the increase in utility costs during the spike in prices.	(0.174)
Other small variances	0.040
<b>Health, Wellbeing and Leisure - Variance as at 31/03/2025</b>	<b>(0.967)</b>

<b>Heritage, Culture and the Arts - Variance as at 31/12/2024</b>	<b>(0.245)</b>
Additional Income from the National Civil War Centre and Newark Museum compared to Q3 outturn forecast.	(0.022)
Other small variances	(0.027)
<b>Heritage, Culture and the Arts - Variance as at 31/03/2025</b>	<b>(0.294)</b>

<b>Housing - Variance as at 31/12/2024</b>	<b>0.198</b>
Additional income on private sector speech call mainly due to increase in customer base regarding the transfer of customers from Mansfield District Council	(0.066)
Other small variances	(0.026)
<b>Housing - Variance as at 31/03/2025</b>	<b>0.106</b>

<b>Public Protection and Community Relations - Variance as at 31/12/2024</b>	<b>(0.130)</b>
Other small variances	0.004
<b>Public Protection and Community Relations - Variance as at 31/03/2025</b>	<b>(0.126)</b>

<b>Strategy, Performance and Finance - Variance as at 31/12/2024</b>	<b>0.281</b>
Variance on the electricity expenditure forecast at Q3 outturn compared to actual outturn.	(0.138)
Additional income received via the collection fund for council tax court costs.	(0.044)
Other small Variances	(0.008)
<b>Strategy, Performance and Finance - Variance as at 31/03/2025</b>	<b>0.091</b>

<b>Sustainable Economic Development - Variance as at 31/12/2024</b>	<b>0.083</b>
Other small Variances	(0.016)
<b>Sustainable Economic Development - Variance as at 31/03/2025</b>	<b>0.067</b>

<b>General Fund Revenue Outturn for Services - Variance as at 31/03/2025</b>	<b>(1.744)</b>
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**Housing Revenue Account (HRA) Revenue Outturn Variance Analysis as at 31 March 2025**

Favourable variances are bracketed and in red - £(0.000)m. Unfavourable variances are in black - £0.000m.

<b>HRA - £(0.602)m</b>		<b>£'m</b>
Housing & Estates Management	Salary underspends due to unused job evaluation provisions, 3 Housing Choice Advisors roles being removed, and vacancies such as: Tenancy Assistants, Street Wardens, Tenancy Officer	(0.530)
Housing Income & Leaseholder Management	Salary underspends due to vacancies such as: x2 Tenancy Assistants, Apprentice, Rent Recovery Assistant and Income Recovery Team Leader	(0.093)
Housing Maintenance & Asset Management	Compliance costs have been higher due to air source and oil servicing and repairs works being done. Also catching up with a backlog of works in 'Fire Alarm and Emergency Lighting', 'Periodic Electrical Testing' and 'Appliance Servicing'.	0.162
Housing Maintenance & Asset Management	Responsive repairs contractual works costs higher due to volume of work higher than anticipated and cost of services has increased	0.264
Housing & Estates Management	Gas underspends across Gladstone House and Broadleaves due to unused accruals carried over from last year	(0.039)
Yorke Drive	Underspends largely due to delays in the scheme meaning fewer tenants moving out (less home loss payments)	(0.205)
Housing & Estates Management	Council tax voids losses	0.142
All	Various recharges from GF underspent due to vacancies	(0.518)
All	Vacancy Factor	0.292
All	Other small variances	(0.077)
<b>HRA Total</b>		<b>(0.602)</b>

**Housing Revenue Account (HRA) Revenue Outturn Change in Variance Analysis between 31 December 2024 and 31 March 2025.**

Favourable variances are bracketed and in red - £(0.000)m. Unfavourable variances are in black - £0.000m.  
All amounts are in millions of pounds (£'m)

<b><u>HRA - Variance as at 31/12/2024</u></b>	<b>0.061</b>
Rental income over and above the Q3 outturn forecast figure.	(0.399)
Movement on Q3 forecast for recharges expenditure due to vacancies within the GF departments that have salaries expenditure within the recharge calculations.	(0.264)
Other small variances	0.000
<b><u>HRA - Variance as at 31/03/2025</u></b>	<b>(0.602)</b>

## General Fund - Spend against budget - Estimated in year

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.12.24	Current outstanding orders	Additional anticipated spend in year	Total Projected spend in year	Variance Over/Underspend	Comments - Spend to date	Slippage Required
TA3062	Beacon EV Chargepoints	36,850	0	36,850	0	0	0	0	-36,850	9.10.24 load test survey currently being carried out before capital works can start. 16.01.25 Reprofile budget to April 25 with a view to seeking further quotes	36,850
TB2253	Vehicles & Plant	50,400	0	50,400	146,149	0	0	146,149	95,749	12.07.24 lead in times are currently an issue but orders will be placed for planned replacement 16.01.25 reprofile £50k to 25/26	-66,999
TB2255	Glass Recycling Transfer Station	8,425	0	8,425	6,545	0	0	6,545	-1,880	12.07.24 works complete and site in use.	0
TB2258	Vicar Water Improvements (SANGS)	35,556	0	35,556	0	0	0	0	-35,556		35,556
TB2260	Sconce & Devon Pitch Improvements	50,000	0	50,000	49,996	0	0	49,996	-4	12.07.24 works started and will continue until September 24. 16.01.25 works complete	0
TB3155	Castle - Condition Works	378,758	0	378,758	337,593	0	0	337,593	-41,165	12.07.24 works are underway now including ph 2 and will be complete by end of the calendar year 16.01.25 90% complete but some works deferred. Reprofile £134k to 25/26	0
TC3136	Climate Change	168,300	-168,300	0	0	0	0	0	0	18.02.25 move budget required to new woodland scheme	0
TC3154	Solar PV	422,591	-246,341	176,250	176,430	0	0	176,430	180	12.07.24 5 sites, 3 almost complete and ready for handover, 2 still to do. 9.10.24 all installations complete. Just final paperwork to complete and payment schedule. 18.02.25 move required budget to new woodland scheme	0
TC3158	Upgrade Charging point at Castle House	75,000	0	75,000	74,419	0	0	74,419	-581	09.10.25 Purchase order to go to supplier in October. Scheme due for completion in December 25. Consultation with ICT on power.	0
TF3227	Lowdham Flood Alleviation	200,000	0	200,000	200,000	0	0	200,000	0	12.07.24 the environment agency are completing the works. Waiting for the draft agreement. 09.10.24 Draft agreement with Legal to be finalised. Reprofile £100k to 25/26. 16.01.25 agreement to be signed for the money to be released.	0
	<b>CLIMATE AND THE ENVIRONMENT TOTAL</b>	<b>1,425,880</b>	<b>-414,641</b>	<b>1,011,239</b>	<b>991,131</b>	<b>0</b>	<b>0</b>	<b>991,131</b>	<b>-20,108</b>		<b>5,407</b>
TA1218	Leisure Equipment Purchase	626,196	0	626,196	626,196	0	0	626,196	0	12.07.24 - direct award through ESPO framework, still working through with Legal, anticipating install by October 24 09.10.24 BCLC, NSFC, DLC installations started in September. 16.01.25 installations are now complete. Remaining budget is not required.	0
TA1221	SLC Fire Safety Remedial Works	103,805	0	103,805	89,805	0	0	89,805	-14,000	16.01.25 Reprofile the remaining budget to 25/26	14,000
TA1222	Leisure Centre Provision	0	0	0	0	0	0	0	0	09.10.24 reprofile the budget to 2025/26	0
TA1225	NSFC Replacement Pool Cover and LED Lights	71,356	0	71,356	61,171	0	0	61,171	-10,185	9.10.24 x3 quotes required on pool covers, will do a trail in the Gym for the LED lights. Scheme to be carried out in stages. 16.01.25 pool cover is being installed on 18 Feb. awaiting quotes on LED lights.	0

[illegible]

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.12.24	Current outstanding orders	Additional anticipated spend in year	Total Projected spend in year	Variance Over/ <u>Underspend</u>	Comments - Spend to date	Slippage Required
TA1223	Dukeries Changing Places	100,000	0	100,000	87,663	0	0	87,663	-12,337	12.07.24 at design stage, hope to be on site Dec 24. 9.10.24 out to tender, SOS due 2 December with a 3-4 week build time. 16.01.25 on site, due to finish in January.	0
TA3053	Museum Improvements	35,283	0	35,283	0	0	0	0	-35,283	12.07.24 tudor attic now back in use, plans can be put forward. 9.10.24 working through the plan 16.01.25 expecting to spend £30k in 24/25, reprofile remaining to 25/26.	35,280
TA3056	NCWC Tudor Hall	82,380	0	82,380	74,550	0	0	74,550	-7,831	17.07.24 complete, only £5k retention left to pay in 25/25.	0
TA3057	Palace Theatre Emergency Lighting	0	0	0	0	0	0	0	0	12.07.24 scheme complete	0
TA3058	Palace Theatre Fire Alarm Upgrade	151,145	0	151,145	82,355	0	0	82,355	-68,790	12.07.24 due to start on site 22.07.24 5 week programme. 9.10.24 scheme complete. 16.01.25 invoices currently being finalised, expecting an underspend. 31.03.25 complications with the doors requires contractor to come back early in 2025/26.	7,380
TA3064	Palace Theatre Sound Desk	35,000	0	35,000	31,870	0	0	31,870	-3,130	16.01.25 scheme complete.	0
TA3065	Kidney Stones	0	0	0	0	0	0	0	0	16.01.25 tenders due to go out Jan 25, expecting to carry out the works in April 25 when the whether is better - reprofile budget.	0
TB2256	Glass Recycling Bin Purchase	460,139	0	460,139	454,944	0	0	454,944	-5,196	12.07.24 all orders raised and bins required have been received. £74k underspend not required. 14.10.24 final invoice received, budget needs to be increased back to original.	0
TB3154	Castle Gatehouse Project	500,000	0	500,000	327,602	0	0	327,602	-172,398	12.07.24 project will be tendered during the summer for the main build which will inform the required budet profile. To be updated in Q2. Current completion date 2026. TF grant to be spent by March 2026. 9.10.24 out to tender at the moment, due back at the end of October at which point we'll have firmed up costs for the project. 16.01.25 finalising value engineering report due to Cabinet on 18 Feb.	172,398
	<b>HERITAGE, CULTURE &amp; THE ARTS TOTAL</b>	<b>1,363,948</b>	<b>0</b>	<b>1,363,948</b>	<b>1,058,983</b>	<b>0</b>	<b>0</b>	<b>1,058,983</b>	<b>-304,965</b>		<b>215,058</b>
TF3228	Homeless Hostel	0	0	0	0	0	0	0	0	12.07.24 scheme complete, review outstanding orders that can be deleted.	0
TF3267	Homes for Ukraine	227,445	0	227,445	225,446	0	0	225,446	-1,998	12.07.24 works ongoing expected completion Sept 24. 9.10.24 scheme complete, finalising final invoices.	0
TF3268	Bridging Accomodation	0	0	0	-0	0	0	-0	-0		0
TF6011	Private Sector Disabled Facilities Grants	1,034,848	0	1,034,848	899,770	0	0	899,770	-135,077	12.07.24 25 approvals completed to date. 16.01.25 a number of referrals are pending.	0
TF6012	Discretionary DFG	142,783	0	142,783	165,412	0	0	165,412	22,630	9.10.24 Cabinet approved increase to the discretionary DFG value. 16.01.25 costs here will increase now NCC are no longer topping up grants	0

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TF6807	Warm Homes on Prescription	101,759	0	101,759	47,345	0	0	47,345	-54,414	16.07.24 Q1 and Q2 are quieter periods for this scheme, action taken to make the scheme more attractive by working in collaboration with Mansfield District Council to review/update the maximum household income threshold (to reflect inflationary increases and to bring criterium into line with Gov't guidance for similar grant-funded home energy efficiency schemes) and are hopeful more residents will apply going forward. 9.10.24 8 cases completed so far. improved the criteria to attract more demand, review budget in Q3.	0
	<b>HOUSING TOTAL</b>	<b>1,506,834</b>	<b>0</b>	<b>1,506,834</b>	<b>1,337,974</b>	<b>0</b>	<b>0</b>	<b>1,337,974</b>	<b>-168,860</b>		<b>0</b>
TA3061	Beacon - LED Lights	78,640	0	78,640	0	0	0	0	-78,640	12.07.24 had to delay the tender process, adjust required to the design, but still anticipated completion by March 25. 9.10.24 tenders will be finalised by December and SOS Jan 25 install by the end of March 25. 16.01.25 due to carry out some more market testing. Reprofile to April 25.	78,640
TA3060	Beacon - New Boiler	0	0	0	0	0	0	0	0	reprofile to next year	0
TA3286	Information Technology Investment	757,133	0	757,133	514,118	0	0	514,118	-243,015	12.07.24 - whole Council hardware and software	110,700
TC2006	Land at Bowbridge Road Purchase & Works	1,000	0	1,000	0	0	0	0	-1,000	12.07.24 car park works are completed, retention left to pay, no futher budget required.	0
TC2007	Clipstone Holding Centre Purchase & Works	474,064	0	474,064	224,631	0	0	224,631	-249,433	12.07.24 planning app to be submitted by the end of July to be on site by Nov 24. will reprofile budget 9.10.24 Planning app submitted, waiting for validation, tender documents being prepared. SOS expected Feb 25. 16.01.25 scheme is now due to go to planning on 13 Feb 25 subject to highways comments. 31.03.25 planning permission obtained in march 25 tender due to go out June 25.	249,433
TC2009	Former Belvoir Iron Works	900,000	0	900,000	-0	0	0	-0	-900,000	12.07.24 phase 2 site investigations ongoing. 9.10.24 invetigations not due to finish until January 25, expecting to spend c£900k in 24/25.	900,000
TC2010	Purchase Former Ollerton Bank	161,584	0	161,584	154,752	0	0	154,752	-6,832	17.07.24 purchase meant to complete at end of July 24. 9.10.24 purchased completed on 31st July.	0
TC3016	Legionella Remedial Works	0	0	0	0	0	0	0	0		0
TC3135	Works to Buttermarket	56,357	0	56,357	0	0	0	0	-56,357	9.10.24 lift to be installed in 24/25. 14.10.24 lift refurbishment will be complete by the end of March 25.	56,360
TC3138	Lord Hawke Way Remedial Works & Bond	0	0	0	0	0	0	0	0	12.07.24 scheme complete	0
TC3142	Common Lighting at Industrial Estates	6,138	0	6,138	0	0	0	0	-6,138	12.07.24 remaining budget not required	0
TC3144	Fire & Security Rear Entrance Doors at Industrial Units	4,332	0	4,332	0	0	0	0	-4,332	12.07.24 remaining budget not required	0
TC3148	RHH Units Fit Out	50,676	0	50,676	89,250	0	0	89,250	38,575	17.07.24 beaumont cross - works still progressing budget increase request.	0
TC3155	Security Gates Burma Road, Clipstone, S'well, SOT, SFACC	0	0	0	0	0	0	0	0	12.07.24 remaining budget not required	0

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.12.24	Current outstanding orders	Additional anticipated spend in year	Total Projected spend in year	Variance Over/Underspend	Comments - Spend to date	Slippage Required
TC3156	Jubilee Bridge Works	0	0	0	0	0	0	0	-0	12.07.24 Project delayed until negotiations with NCC have been resolved. 9.10.24 negotiations continuing with NCC and report due to Cabinet when completed. Reprofile budget into 2025/26 16.01.25 budget to be reduced to £60k and reprofiled to 25/26.	0
TC3157	Shower Block Lorry Park	24,497	0	24,497	24,383	0	0	24,383	-114		0
TC3160	14 Market Place	93,000	0	93,000	0	0	0	0	-93,000	12.07.24 out to tender in July 24, to start on site end of Sept/Oct 24. may not need full budget initially due to change to recommendation, will update accordingly in Q2. 9.10.24 tender to be awarded in October. Reprofile £200k to 25/26 based on SOS in November/December 24. 16.01.25 report went to December 24 Cabinet, negotiations taking place now, reprofile £60k to 25/26.	93,000
TG1003	Housing Regeneration Loan Facility	5,000,000	0	5,000,000	3,213,500	0	0	3,213,500	-1,786,500	25.07.27 Lowfield Lane works starting this year will spend the full budget. Will review again at Q2 incase this gets pushed back.	1,786,500
	<b>STRATEGY, PERFORMANCE AND FINANCE TOTAL</b>	<b>7,607,420</b>	<b>0</b>	<b>7,607,420</b>	<b>4,220,634</b>	<b>0</b>	<b>0</b>	<b>4,220,634</b>	<b>-3,386,786</b>		<b>3,274,633</b>
TC2011	Ollerton Regeneration	500,000			0	0	0	0	-500,000		0
TE3250	Shared Prosperity Fund	120,440	9,000	129,440	129,555	0	0	129,555	115	9.10.24 all funding is allocated to external projects and is due for spend by March 25. 16.01.25 forecast to be spent by March for recently awarded projects.	0
TE3251	Rural England Prosperity Fund	654,979	0	654,979	654,915	0	0	654,915	-64	9.10.24 all funding is allocated to external projects and is due for spend by March 25. 16.01.25 grant recipients due to claim remaining funding.	0
TE3268	Southern Link Road Contribution	2,271,824	0	2,271,824	2,278,823	0	0	2,278,823	7,000	12.07.24 £3m NCC money now due, budget needs to be increased to include again. 9.10.24 still waiting on NCC to send order for £3m which is due to be passed to U&C in line with Grant Agreement. 16.01.25	-7,000
TI1002	A1 Overbridge Improvements	76,000	0	76,000	31,415	0	0	31,415	-44,585		44,585
TT1000	Towns Fund - 32 Stodman Street Regeneration	2,970,866	0	2,970,866	2,367,731	0	0	2,367,731	-603,134	12.07.24 report to cabinet in July 24 to approve additional TF grant to be allocated to the scheme. Delays to programme due to archaeology. 9.10.24 chase up cashflow. Reprofile £2m to 25/26 in the meantime. 16.01.25 bring £150k forward from 25/26 to cover the expected spend. foundations nearing completion and steel frame manufactured, high vault cables diverted and party wall works have commenced, scheme is on track for completion by March 2026.	603,134
TT1002	Town Fund - Contribution to IASTI	0	0	0	0	0	0	0	0	12.07.24 waiting on collateral warranties to be signed off before the final payment can be made.	0
TT1005	Towns Fund - Cycle Town	0	0	0	0	0	0	0	0	12.07.24 remaining budget is in relation to S106 money.	0
TT1006	Towns Fund - Cultural Heart of Newark	0	0	0	0	0	0	0	0	9.10.24 steven - profile	0
TT1007	Towns Fund - Newark Gateway / SISLOG	0	0	0	0	0	0	0	0	12.07.24 - refer to report	0
	<b>SUSTAINABLE DEVELOPMENT AND REGENERATION</b>	<b>6,594,108</b>	<b>9,000</b>	<b>6,103,108</b>	<b>5,462,439</b>	<b>0</b>	<b>0</b>	<b>5,462,439</b>	<b>-1,140,668</b>		<b>640,719</b>
	<b>TOTALS</b>	<b>21,200,472</b>	<b>-405,641</b>	<b>20,294,831</b>	<b>15,060,468</b>	<b>0</b>	<b>0</b>	<b>15,060,468</b>	<b>-5,734,363</b>		<b>4,812,465</b>

## HRA - Spend against budget - Estimated in year

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.03.25	Variance Over/ Underspend	Comments - Spend to date	Slippage Required
<b>PROPERTY INVESTMENT PROGRAMME</b>								
S91100	ROOF REPLACEMENTS	1,100,000	0	1,100,000	1,012,602	-87,398	10.07.24 slowing down spend in August, 77 roofing works completed so far this FY, 55 pitched 22 flat roofs. Expect to spend full budget 10.10.24 completed 146 to the end of September. 13.01.25 £50k minimum needed for Millgate roof, heritage assessment complete works need to be done by year end. 17.03.25 Expecting another £140k invoices to be paid by the end of the week, expecting more work to start before year end, possible accrual needed to carry funds forward. 28.05.25 Under budget due to roofing projects ongoing into 25-26, looking to carry forward to cover the outstanding work	89,400
<b>S711</b>	<b>ROOF REPLACEMENTS</b>	<b>1,100,000</b>	<b>0</b>	<b>1,100,000</b>	<b>1,012,602</b>	<b>-87,398</b>		
S91205	Bathrooms		0		0	0		
S91219	Kitchens		0		0	0		
S91218	Kit & Bathrooms	2,115,750	0	2,115,750	2,188,124	72,374	10.07.24 64 total works completed so far, out of a total of 250/300 for the FY. Predicting full budget spend. Contract runs out Nov/Dec 24. 10.10.24 117 completed to mid september. Still on target to spend the full budget. 13.01.25 Expected to spend full budget, PO raised to cover upto end of Feb. 18.03.25 Expected to be over budget.	0
<b>S712</b>	<b>KITCHEN &amp; BATHROOM CONVERSIONS</b>	<b>2,115,750</b>	<b>0</b>	<b>2,115,750</b>	<b>2,188,124</b>	<b>72,374</b>		
S91300	EXTERNAL FABRIC	378,000	0	378,000	387,061	9,061	10.07.24 79 properties with works completed this FY 10.10.24 due to carry out 204 properties, all at 60% or more completion. 13.01.25 Full spend anticipated by end of financial year.	0
<b>S713</b>	<b>EXTERNAL FABRIC</b>	<b>378,000</b>	<b>0</b>	<b>378,000</b>	<b>387,061</b>	<b>9,061</b>		
S91401	Doors		0		0	0		0
S91413	Windows		0		0	0		0
S91412	Doors & Windows Works	214,200	0	214,200	186,734	-27,466	09.07.24 23 total works completed so far, invoice for £37k awaiting. Works speeding up, budget expected to be fully spent. 10.01.25 Work issued, expected to spend £200k in total upto year end. 17.03.25 Current back log on jobs therefore not all £70k committed will be complete by YE. May need to carry forward budget for non completed jobs to 25/26 28.05.25 Underspend due back log of jobs not completed.	27,470
<b>S714</b>	<b>DOORS &amp; WINDOWS</b>	<b>214,200</b>	<b>0</b>	<b>214,200</b>	<b>186,734</b>	<b>-27,466</b>		
S91500	OTHER STRUCTURAL	553,282	0	553,282	419,581	-133,701	09.07.24 putting in planned schedule for the remainder of the year, 3 works fully completed so far, 20 part completed. Expecting to need additional budget to pick up backlog of works. 13.01.25 New strategy respond & monitor works which has created an additional spend. Expected to need additional £100k upto end of year. Works are now being progressed. 17.03.25 Project at Victoria Gardens is delayed therefore may need to accrue for remaining contract to be paid on 25/26, approx £50k. 28.05.25 Works still ongoing at Victoria Gardens & Sandhill, propose to carry full underspend forward to over the remaining work.	133,700



Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.03.25	Variance Over/ Underspend	Comments - Spend to date	Slippage Required
S91535	DPC Works	110,000	0	110,000	95,710	-14,290	25.07.24 works starting imminently 10.10.24 Some unforeseen works found, so cost likely to be higher than expected, still within existing budget. 13.01.25 3 live jobs currently, additional spend anticipated as unexpected costs incurred. Expected to fully spend budget to end of year. 17.03.25 works ongoing at Easthorpe, propose to carry forward budget	14,290
S715	OTHER STRUCTURAL	663,282	0	663,282	515,292	-147,990		
S93100	ELECTRICAL	0	0	0	0	0		
S93115	Rewires	843,728	0	843,728	622,424	-221,304	11.07.24 27 property rewires completed so far this FY. Contract finishes in December 24, predicting slight underspend, to review in Q2. 17.01.24 120 property rewires completed this FY. Contract completes end of Feb 25, will be an underspend but possibly needs to be moved to other projects. 21.03.25 Contract ended in Feb, nothing been done since. Expecting approx £195k underspend 28.05.25 Contract ended in February with Shacklocks, new contract due to start in the new FY hence no works completed in between. £10k retention to pay and also invoice to Bamfords for £25,220 relating to works in 24/25, propose to carry forward £35,220 in 25/26.	35,220
S731	ELECTRICAL	843,728	0	843,728	622,424	-221,304		
S93300	Passenger Lifts	52,500	0	52,500	72,000	19,500	17.01.25 Expected to fully spend budget by the end of the financial year, possibly may need an additional £5k if any repair works come in. 21.03.25 Final invoice is covered by current PO, not expecting works to complete until April, need manual accrual for remaining £16k on order for works completed to end of March.	0
S733	PASSENGER LIFTS	52,500	0	52,500	72,000	19,500		
S93500	HEATING	1,314,174	0	1,314,174	1,337,548	23,374	09.07.24 hold on payments due to bad performance - expected spend actually around £310k as at end June. 69 jobs complete so far, expecting full spend this FY. 17.01.25 Account with Phoenix needs to be reconciled before any further payments made, expected to fully spend budget before end of FY. Need to check if any o/s invoices and confirm what needs to be spent for rest of FY. 18.03.25 Invoices now being paid, expecting to be £165 underspend depending on remaining jobs in March.	0
S735	HEATING	1,314,174	0	1,314,174	1,337,548	23,374		
S93600	ENERGY EFFICIENCY	5,495	0	5,495	0	-5,495		
S93622	PV Invertors	210,000	0	210,000	49,950	-160,050	25.07.24 using for adhoc energy efficiency works outside of Decarbonisation. Expecting an underspend. Will review in Q2. 21.03.25 No expected further spend, underspend to be utilised elsewhere. 28.05.25 Budget not fully utilised in 24/25 however new contract for servicing starting in 25/26 which will see increased spend, propose to carry over full underspend.	160,050
S93624	EE Boilers	0	0	0	0	0		0
S93625	Thermal Comfort	67,129	0	67,129	33,330	-33,799	25.07.24 using for adhoc energy efficiency works outside of Decarbonisation. Expecting an underspend. Will review in Q2. 14.10.24 works will be identified following EPCS. 28.01.25 £25k actuals, income needs to be moved to decarb, underspend of £100k	0

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S93626	Decarbonisation	1,370,260	0	1,370,260	1,456,175	85,915	10.07.24 41 works completed in first year and 24 completed so far this FY. 40 jobs left to complete in scheme. On track to finish scheme early in Oct/Nov 24. 10.10.24 98 jobs completed, out of 102, waiting on some invoices to be up to date with spend, invoiced for 53 jobs. 15.01.25 Another 4 jobs planned in, plus requests for an additional 4 jobs. Possible additional budget required for additional 4 jobs £44k. 17.03.25 additional jobs to be invoiced for, 4 fully funded and 8 x 50% funded. Additional £90k required to cover.	0
S93627	Decarb Devolution	216,824	0	216,824	245,934	29,110	10.07.24 Scheme will be finished in September 24. 28 total works completed with 5 still ongoing. Scheme ongoing, expecting £20k overspend - in talks with devolution team to recover this money. 10.10.24 waiting on final invoice then will put in the final claim from Nottingham City Council. 15.01.25 final claim to NCC submitted in December and final payment recieved. Project now complete. 17.03.25 Final payment recieved from NCC, now complete.	0
S93628	EPC	157,500	0	157,500	57,767	-99,733	18.07.24 stock condition survey works around £100k, and EPCs for around £90,000 are a possibility. 15.01.25 Expected to be finished by year end upto the current commitment, expected to be an underspend. Need to review with Simon. REPROFILE 17.03.25 Approx £15 left to pay on remaining PO. Residual budget to be carried forward for planned works 25/26. 28.05.25 Late procurement of contract contributed to underspend, propose to carry forward £95k for ongoing data collection costs.	99,740
S736	ENERGY EFFICIENCY	2,027,208	0	2,027,208	1,843,156	-184,052		0
S95100	GARAGE FORECOURTS		0		0	0		0
S95109	Garages		0		0	0		0
S95115	Resurfacing Works	61,024	0	61,024	45,296	-15,728	10.07.24 plans to spend some of this budget (around £10k) at Queens Court, purchase order being raised this week. 10.10.24 works at queens court complete. Two further sites in the pipeline, at the moment. 13.01.25 Antipated full spend by year end. 17.03.25 Not expecting any further spend by year end	0
S751	GARAGE FORECOURTS	61,024	0	61,024	45,296	-15,728		0
S95200	ENVIRONMENTAL WORKS	131,658	0	131,658	133,328	1,670	25.07.24 expecting full budget spend. May be split between other environmental codes	0
S95203	Car Parking Schemes	0	0	0	0	0		0
S95208	Sewerage Treatment Works	0	0	0	0	0		0
S95250	Communal Lighting	24,000	0	24,000	0	-24,000	12.07.24 no works identified yet but confident this budget will be spent 17.01.25 PO raised for full amount of budget for HD electrical. Not expecting any further spend. 21.03.25 £24k spent on HD lighting, PO raised on Revenue code, speak to Megan to move actuals, Vince to send breakdowns 28.05.25 No capital spend on communal lighting in 24/25. In 25/26 there is no budget however proose to carry over £24k to pay for PV street light in areas needed.	24,000
S95252	Flood Defence Systems	22,000	0	22,000	14,096	-7,904	12.07.24 no works identified yet but confident this budget will be spent, especially with the flooding we had last year. 28.01.25 To be used for 8b Thorpe Close 03.06.25 New project to start in 25/26 to improve estates. Budget required to be carried forward to assist with this.	7,910

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.03.25	Variance Over/ Underspend	Comments - Spend to date	Slippage Required
S95254	Estate Improvements	119,000	0	119,000	65,734	-53,266	25.07.24 £70k of the budget will be spent at Gladstone and Vale View with other works yet to be identified. 13.01.25 Authorised £34k spend to come off into actuals, Vale view now in progress. Expect to be fully spent, possibly move to S91100. 17.03.25 Not expecting any further spend by year end 03.06.25 New project to start in 25/26 to improve estates. Budget required to be carried forward to assist with this.	53,270
S95292	Communal Areas	10,500	0	10,500	0	-10,500	12.07.24 no works identified yet but confident this budget will be spent 28.01.25 Possible spend for some works before year end, to be confirmed 03.06.25 New project to start in 25/26 to improve estates. Budget required to be carried forward to assist with this.	1,060
S95304	Tithe Barn & Queens Court	0	0	0	0	0		0
S95305	Boughton Community Hub	8,000	0	8,000	7,184	-816	12.07.24 finalising last jobs, hub is open to the public 13.01.25 Now complete	0
S95306	Ferndale Conversion	150,000	0	150,000	149,734	-266	15.10.24 started on site in July 24, will be complete within 6 months. 14.01.25 Expected to be fully spent, less the £266 remaining.	0
S95307	PV Panels Broadleaves and Gladstone	217,000	0	217,000	177,193	-39,807	25.07.24 out for procurement at the moment, evaluating mid August. Estimating to start on site in Q3. 16.01.25 Estimated start Feb 25, Awaiting Legal to sign contracts off. Still anticipated to finish before the end of Financial Year. Likely that there will be a small underspend at the end of the year. 17.03.25 Expecting underspend of around £35k due to the contract value being less than original budget.	0
S95308	Repairs to CDs from Floods 2324	360,617	0	360,617	358,997	-1,620	09.07.24 works started in July on 10 properties and will be complete by end of September 24 ready for letting. Phase 1 was complete last FY in phase 2 now, out of 5 10.10.24 works complete, waiting for final account from contractor. 13.01.25 All works competed, tenants all moved back in, one additional fence needed so expected to fully spend budget. 17.03.25 All works now complete	0
S95309	Allenby Road Conversion	140,000	0	140,000	0	-140,000	23.01.25 Expecting works to start in the next couple of weeks, possible reprofiling into 25/26 once we know what costs are going to come in before the end of FY. 18.03.25 Reprofile to 25/26	140,000
S95400	Void Works	494,864	0	494,864	336,404	-158,460	Speak to Craig. Should be larger spend on Voids due to all of the works being classified as Voids and not rev. 13.01.25 Expected to fully spend remaining budget plus potentially another £50k required to complete works before year end. £32,500 also needs moving into voids from S91218. 18.03.25 All works now done & about to be signed off. Expecting to spend upto current order amounts, should come in on budget. 03.06.25 Approx 50 voids not complete in 25/26, propose to carry over full underspend. 28.05.25 Currently continuing to catch up on outstanind void works, so budget carry forward required.	158,460
S752	ENVIRONMENTAL WORKS	1,677,639	0	1,677,639	1,242,670	-434,969		
S97100	ASBESTOS	63,000	0	63,000	29,459	-33,541	17.07.24 vacant surveyor works will pick back up once someone is in post 14.10.24 new surveyor starting at the end of October 17.01.25 Expected to fully spend budget for year end. All jobs have PO raised for currently. £10k remaining will be for any additional works that come in. 28.05.25 No surveyor in post between July & November, new surveyor now in post and works picking up. Propose to carry over full underspend due.	33,540

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.03.25	Variance Over/ Underspend	Comments - Spend to date	Slippage Required
<b>S771</b>	<b>ASBESTOS</b>	<b>63,000</b>	<b>0</b>	<b>63,000</b>	<b>29,459</b>	<b>-33,541</b>		
S97200	FIRE SAFETY	288,455	0	288,455	137,778	-150,677	17.07.24 vacant surveyor works will pick back up once someone is in post 14.10.24 new surveyor starting at the end of October 17.01.25 Expected to full spend budget before year end. Fire door remedial works to be completed. 03.06.25 Surveyor vacant towards the end of FY, works still to be competed for 24/25 carry forward budget	150,680
S97218	Enhanced Fire Risk Assessments	0	0	0	0	0		0
S97221	Fire Doors Various Locations	0	0	0	0	0		0
<b>S772</b>	<b>FIRE SAFETY</b>	<b>288,455</b>	<b>0</b>	<b>288,455</b>	<b>137,778</b>	<b>-150,677</b>		
S97300	DDA IMPROVEMENTS		0		0	0		
<b>S773</b>	<b>DDA IMPROVEMENTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>		
S97400	DISABLED ADAPTATIONS	0	0	0	0	0		0
S97416	Major Adaptations	815,000	0	815,000	976,201	161,201	12.07.24 108 completed works. Number of OT1 referrals are record highs. Expecting to spend full budget. 14.10.24 received 226 referrals to date, completed 215. Referrals are being received all the time, therefore budget review required to continue to end of March. 13.01.25 PO raised upto £800k for Matthews & Tannerts, some smaller jobs also comitted. Typical spend £80k per month. Possible additional £180k needed upto year end.	0
S97417	Minor Adaptations	70,000	0	70,000	60,511	-9,489	12.07.24 142 completed works. Receiving around 40/50 OT1 referrals each month now. Expected to spend full budget. 14.10.24 285 referrals received so far this financial year and completed 275 to date. 13.01.25 December jobs agreed total £8,600 approx. Expected to spend remaining budget plus an additional £8-9k required upto the end of the year. 17.03.25 Requested additional £1.5k into budget to complete jobs for FY end	0
S97418	Adaptation Stair Lift/Ho	80,608	0	80,608	81,377	769	12.07.24 8 completed works for stairlifts/hoists. Expecting to spend full budget. 14.10.24 25 of the 226 major referrals relate to stairlifts and hoists, with 20 complete. 13.10.24 5 new jobs in to be completed for January totalling £14k, included in commitments. Possible that more job may come in before year end increasing the overspend.	0
<b>S774</b>	<b>DISABLED ADAPTATIONS</b>	<b>965,608</b>	<b>0</b>	<b>965,608</b>	<b>1,118,090</b>	<b>152,482</b>		
S97500	LEGIONELLA	55,042	0	55,042	55,042	-0	31.01.25 More assessments expected. 18.03.25 Possible small over spend	0
<b>S775</b>	<b>LEGIONELLA</b>	<b>55,042</b>	<b>0</b>	<b>55,042</b>	<b>55,042</b>	<b>-0</b>		
S98100	BUILDING SAFETY	0	0	0	0		17.07.24 currently a vacant surveyor works will pick back up once someone is in post 0 14.10.24 reduce expected spend to cover spend on lightening conductors and structural works 28.01.25 £100k moved to voids	0
S98105	Compartmentalisaton in Roof Space	50,489	0	50,489	49,696	-793		0
<b>S781</b>	<b>BUILDING SAFETY</b>	<b>50,489</b>	<b>0</b>	<b>50,489</b>	<b>49,696</b>	<b>-793</b>		
S99100	PROPERTY INVESTMENT CONTINGENCY	60,000	0	60,000	0	-60,000	14.10.24 contingency to cover the overspend on structural works	0

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.03.25	Variance Over/ Underspend	Comments - Spend to date	Slippage Required
S99102	Housing Capital Fees	576,690	0	576,690	542,264	-34,426	Investment team salary underspends in year due to vacancies - 1 x Apprentice surveyor for year & 1 senior investment surveyor.	0
<b>5791</b>	<b>UNALLOCATED FUNDING</b>	<b>636,690</b>	<b>0</b>	<b>636,690</b>	<b>542,264</b>	<b>-94,426</b>		
	<b>SUB TOTAL PROPERTY INVESTMENT</b>	<b>12,506,789</b>	<b>0</b>	<b>12,506,789</b>	<b>11,385,236</b>	<b>-1,121,553</b>		<b>1,128,790</b>
	<b>AFFORDABLE HOUSING</b>							
SA1031	Site Acquisition (Inc RTB)	130,887	0	130,887	130,480	-407	18.07.24 Church Circle to be acquired in the coming months aiming for completion at end of August - cost £160k. Gusto site Station Rd, Collingham is due in Cabinet for spend of £700k. Reprofile the rest of the budget. 9.10.24 Church Circle due to complete now in October. Station Road is progressing but will be a phase 6 site, so costs will be incurred in SA1092. Reprofile £800k to 25/26. 14.01.25 Church circle complete, Station Road same as previous comment. 18.03.25 No further spend	0
SA1033	Estate Regeneration	199,546	0	199,546	182,568	-16,978	14.10.24 Report due to November Cabinet to update Members on the scheme and seek approval to move forward. Planning permission to be determined in December. 17.01.25 Report went to December cabinet and was approved, including the reprofiling of budget, complexities with planning have led to committee date expected early 2025. 18.03.25 Not expecting any further spend other than what's already committed. Reprofile to 25.26.	16,980
SA1037	Purchase of 20F Lombard Street	105,500	0	105,500	110,275	4,775	15.01.25 Purchase of lease now complete, budget fully spent.	0
SA1047	New Build Contingency	52,483	0	52,483	0	-52,483	18.07.24 budget available for contingency. 31.03.25 Add in underspends on other clusters.	354,900
SA1048	Boughton Extra Care	39,566	0	39,566	0	-39,566	18.07.24 carrying out defects, quotes due in for works to be done before December 24. Excess budget is retention from North Midland Constructin went into administration. add remaining budget to phase 6. 14.01.25 End of defects work still to be carried out, awaiting quote for this. 18.03.25 Awaiting quotes for end of defects, not going to be spend by YE, carry forward budget for 25/26	39,560
SA1080	Phase 5	20,909	0	20,909	-0	-20,909	18.07.24 complete, some orders have been closed, other spend can be moved to phase 6. 14.01.25 Review and update what needs to be moved. 18.03.25 £45k recharges, £20k o/s order, reallocate costs to 6 clusters	0
SA1081	Phase 5 Cluster 1	1,280,199	0	1,280,199	1,314,947	34,748	18.07.24 1 site complete in Gateskill, Edwinstowe, anticipate remaining sites to be complete Sept 24. 14.01.25 Still on site at Kings Court. Review and update required. 17.03.25 Now complete, order increased by £21,167.52 for retention. Expected to be £18k over budget with retention.	0
SA1082	Phase 5 Cluster 2	779,293	0	779,293	634,916	-144,377	18.07.24 1 site complete, remaining sites to be complete by the end of 2024. 14.01.25 Wolfpit C to be completed in 25/26 reprofile £51,825 into 25/26 18.03.25 GRN's to be added for spend, expected accrual needed for works carried out up to 31 March.	144,380
SA1083	Phase 5 Cluster 3	490,136	0	490,136	183,222	-306,914	18.07.24 anticipate completion in Aug 2024 15.10.24 cluster included a site now being delivered in phase 6. 14.01.25 Land at southwell complete, just retention left to pay. Move rest to contingency. 18.03.25 £6,791.02 retention to pay. Rest needs to be moved to other phases.	0
SA1084	Phase 5 Cluster 4	1,576,633	0	1,576,633	1,227,054	-349,579	18.07.24 cluster to be complete by March 25 14.01.25 On track to complete this financial year. 18.03.25 Some orders to close. Remaining budget to be carried forward as work is still ongoing into 25/26	349,580

Project	Capital Description	Current Revised Budget	Future proposed Variations	Revised Budget including Variations for Approval	Actuals to 31.03.25	Variance Over/ Underspend	Comments - Spend to date	Slippage Required
SA1085	Phase 5 Cluster 5	759,867	0	759,867	699,826	-60,041	18.07.24 Cluster to be complete by March 25. 14.01.25 Still on track to complete 24/25 18.03.25 To be completed by 31/03, £81,920.19 left to pay. Approx £100k underspend to be carried forward or into contingency.	0
SA1086	Phase 5 Cluster 6	974,639	0	974,639	972,834	-1,805	18.07.24 1 site complete, final site completion around Oct 24 - move spend to phase 6. 14.01.25 Eton ave complete, still some spend left. Hawton Lane complete. 18.03.25 Order needs to be increased by £10k, expected o be £20k over.	0
SA1087	Phase 5 Cluster 7	0	0	0	-0	-0	18.07.24 complete just retention left to pay 14.01.25 retention to be paid before end of 24/25 18.03.25 Retention paid, order decommitted, expected £400 overspend.	0
SA1090	Phase 6	605,750	0	605,750	18,970	-586,780	18.07.24 works to begin on South Crescent in Aug/Sept 24 and buying 8 S106 dwellings in Collingham that should total £771k 15.10.24 reallocate costs to correct cluster. 14.01.25 Order on SA1090 needs to be moved to SA1091, expected to be complete by April 25. 18.03.25 Ongoing into 25/26, some budget to be moved into cluster 1.	586,780
SA1091	Phase 6 Cluster 1	682,250	0	682,250	517,463	-164,787	15.10.24 South Crescent, started on site Aug/Sept 24, works to be completed by the end of this financial year. 14.01.25 Expected to fully spend budget this FY, works still due to be completed 24/25. 18.03.25 Ongoing into 25/26 expected spend £585k overall	164,790
SA1092	Phase 6 Cluster 2	200,000	0	200,000	0	-200,000	15.10.24 S106 Properties in Collingham approved at Cabinet on 23 July. 14.01.25 Awaiting S106 agreement currently with Legal. Reprofile £50k to 25/26. 18.03.25 No spend before YE, reprofile total to 25/26.	200,000
SC2000	Careline Analogue to Digital	266,765	0	266,765	266,765	0	18.07.24 works are progressing well on the current replacement. 13.01.25 Not expecting any further spend in 24/25. Underspend to be reprofiled to 25/26 as spend will come in April.	0
SC2002	New Housing Management System	250,000	0	250,000	231,288	-18,712	24.07.24 Project is progressing at pace, the confidence level of meeting May 25 go live for phase 1 is in the 80-85% as reported to the project board. Experienced multiple risks from the risk register, mitigating to the best of abilities and capacity. It is expected that the majority of project costs will be confirmed in the next 3-4 months once the two key integrations are fully scoped with third party costs confirmed. Review in Q2 for any reprofiles. Decisions around hitting go live dates are expected to be made in late 2024 with final option for delay due in Feb 25 when final user testing is undertaken 17.01.25 Project costs not yet confirmed, possible that some costs will need to be reprofiled into 25/26. £18k costs expected before end of FY plus staff recharge costs for Q3 & Q4 (£77k). Project expected to go live as planned in May 25. 24.03.25 Order raised for £21 approx, will be GRN'd before year end. Staffing cost to be recharged plus a small amount of overtime £2k approx. Remaining budget to be carried forward to 25/26.	18,712
	SUB TOTAL AFFORDABLE HOUSING	8,414,423	0	8,414,423	6,490,609	-1,923,815		1,875,682
	TOTAL HOUSING REVENUE ACCOUNT	20,921,212		20,921,212	17,875,845	-3,045,367		3,004,472

## General Fund Reserves

## Appendix G

Description	Balance as at 31st March	Budgeted Movement	Balance as at 1st April	Transfer from	Transfer to	Revised Balance	Commitments	Remaining Balance
MTFP Reserve	(8,461,368.02)	199,450.00	(8,261,918.02)	0.00	(750,000.00)	(9,011,918.02)	5,696,000.00	(3,315,918.02)
Collection Fund Budget	(1,377,234.98)	0.00	(1,377,234.98)	1,377,234.98	0.00	(0.00)	0.00	(0.00)
Budget funding reserve	(9,838,603.00)	199,450.00	(9,639,153.00)	1,377,234.98	(750,000.00)	(9,011,918.02)	5,696,000.00	(3,315,918.02)
Election Expenses Fund	(115,247.07)	0.00	(115,247.07)	0.00	(40,700.00)	(155,947.07)	0.00	(155,947.07)
Insurance & Risk Management Fund	(106,895.00)	0.00	(106,895.00)	16,895.00	(34,089.35)	(124,089.35)	0.00	(124,089.35)
ICT & Digital Services	(110,325.00)	0.00	(110,325.00)	0.00	(158,576.06)	(268,901.06)	158,576.06	(110,325.00)
Repairs And Renewals Fund	(2,463,790.89)	0.00	(2,463,790.89)	831,185.12	(754,202.00)	(2,386,807.77)	238,607.93	(2,148,199.84)
Domestic Homicide Review	(9,820.00)	0.00	(9,820.00)	0.00	(51,000.00)	(60,820.00)	0.00	(60,820.00)
Training Provision	(281,300.00)	0.00	(281,300.00)	57,584.54	(169,610.00)	(393,325.46)	61,054.46	(332,271.00)
Planning Costs Fund	(201,140.00)	0.00	(201,140.00)	109,875.06	(100,000.00)	(191,264.94)	51,324.94	(139,940.00)
CSG/Enforcement Reserve	(95,236.76)	0.00	(95,236.76)	7,500.00	(17,462.49)	(105,199.25)	16,750.00	(88,449.25)
Management Carry Forwards	(770,808.48)	0.00	(770,808.48)	694,678.00	(888,915.35)	(965,045.83)	965,045.83	0.00
Flood Defence Reserve	(250,000.00)	0.00	(250,000.00)	30,000.00	0.00	(220,000.00)	100,000.00	(120,000.00)
NNDR Volatility Reserve	(500,000.00)	0.00	(500,000.00)	500,000.00	0.00	0.00	0.00	0.00
Community Initiative Fund	(110,888.18)	0.00	(110,888.18)	10,000.00	0.00	(100,888.18)	0.00	(100,888.18)
Asset Maintenance Fund	(350,550.00)	0.00	(350,550.00)	350,550.00	0.00	0.00	0.00	0.00
Capital Project Feasibility Fund	(223,011.00)	(160,000.00)	(383,011.00)	105,292.00	0.00	(277,719.00)	164,509.00	(113,210.00)
Community Engagement	(41,891.30)	0.00	(41,891.30)	41,891.30	0.00	(0.00)	0.00	(0.00)
Theatre Centenary Legacy	(17,320.79)	0.00	(17,320.79)	0.00	(1,374.72)	(18,695.51)	0.00	(18,695.51)
Commercial Plan Invest to Save	(200,000.00)	0.00	(200,000.00)	0.00	0.00	(200,000.00)	0.00	(200,000.00)
Workforce Development Reserve	(169,610.00)	0.00	(169,610.00)	169,610.00	0.00	0.00	0.00	0.00
Capital Financing Provision	(1,270,242.71)	(579,500.00)	(1,849,742.71)	532,838.35	(1,975,512.00)	(3,292,416.36)	1,410,300.00	(1,882,116.36)
Earmarked for Known Pressure	(7,288,077.18)	(739,500.00)	(8,027,577.18)	3,457,899.37	(4,191,441.97)	(8,761,119.78)	3,166,168.22	(5,594,951.56)
Building Control Surplus	(61,839.00)	0.00	(61,839.00)	0.00	(20,703.18)	(82,542.18)	0.00	(82,542.18)
Museum Purchases Fund	(58,298.85)	0.00	(58,298.85)	0.00	(2,435.25)	(60,734.10)	0.00	(60,734.10)
Community Safety Fund	(136,507.99)	0.00	(136,507.99)	2,500.00	0.00	(134,007.99)	0.00	(134,007.99)
Homelessness Fund	(110,768.98)	(254,420.00)	(365,188.98)	259,337.00	(565,630.00)	(671,481.98)	0.00	(671,481.98)
Revenue Grants Unapplied	(976,830.41)	0.00	(976,830.41)	495,163.48	(203,885.55)	(685,552.48)	231,190.12	(454,362.36)
Residential Food Waste	0.00	0.00	0.00	0.00	(260,040.09)	(260,040.09)	0.00	(260,040.09)
Energy & Home Support Reserve	(103,171.00)	0.00	(103,171.00)	103,171.00	0.00	0.00	0.00	0.00
Emergency Planning/Flooding Reserve	(60,000.00)	0.00	(60,000.00)	26,128.81	0.00	(33,871.19)	33,871.19	0.00
Community Lottery Fund	(18,078.25)	0.00	(18,078.25)	0.00	(3,144.55)	(21,222.80)	0.00	(21,222.80)
Homes for Ukraine Fund	(353,255.84)	0.00	(353,255.84)	5,000.00	0.00	(348,255.84)	0.00	(348,255.84)
Energy Efficiency East Midlands	0.00	0.00	0.00	10,000.00	(108,555.35)	(98,555.35)	0.00	(98,555.35)
Mansfield Crematorium	(158,385.63)	0.00	(158,385.63)	0.00	(942.54)	(159,328.17)	0.00	(159,328.17)
Ringfenced	(2,037,135.95)	(254,420.00)	(2,291,555.95)	901,300.29	(1,165,336.51)	(2,555,592.17)	265,061.31	(2,290,530.86)
Change Management/Capital Fund	(11,986,697.21)	0.00	(11,986,697.21)	1,335,196.17	(3,135,432.59)	(13,786,933.63)	11,417,729.50	(2,369,204.13)
Gen Fund Bal Bfwd	(1,500,000.00)	0.00	(1,500,000.00)	0.00	0.00	(1,500,000.00)	0.00	(1,500,000.00)
Un-ringfenced	(13,486,697.21)	0.00	(13,486,697.21)	1,335,196.17	(3,135,432.59)	(15,286,933.63)	11,417,729.50	(3,869,204.13)
	(32,650,513.34)	(794,470.00)	(33,444,983.34)	7,071,630.81	(9,242,211.07)	(35,615,563.60)	20,544,959.03	(15,070,604.57)

## HRA Reserves

## Appendix H

Description	Balance as at 31st March	Budgeted Movement	Balance as at 1st April	Transfer from	Transfer to	Revised Balance	Commitments	Remaining Balance
HRA Decent Homes Reserve	(1,500,000.00)	0.00	(1,500,000.00)	0.00	0.00	(1,500,000.00)	0.00	(1,500,000.00)
HRA Unused Efficiency Savings	(999,870.83)	0.00	(999,870.83)	50,000.57	(358,000.00)	(1,307,870.26)	270,000.00	(1,037,870.26)
HRA Service Improvement	(905,218.51)	0.00	(905,218.51)	22,395.09	(978,019.58)	(1,860,843.00)	1,245,624.49	(615,218.51)
HRA Regulatory Compliance / Modernisation	(250,000.00)	0.00	(250,000.00)	0.00	0.00	(250,000.00)	0.00	(250,000.00)
HRA Health And Safety	(364,299.03)	0.00	(364,299.03)	0.00	0.00	(364,299.03)	0.00	(364,299.03)
HRA Management Carry Forwards	(56,450.00)	0.00	(56,450.00)	56,450.00	(233,413.00)	(233,413.00)	233,413.00	0.00
HRA Insurance Fund	(50,000.00)	0.00	(50,000.00)	0.00	0.00	(50,000.00)	0.00	(50,000.00)
HRA Staffing & Pay Reserve	(100,000.00)	0.00	(100,000.00)	13,925.60	0.00	(86,074.40)	57,344.40	(28,730.00)
Earmarked for Known Pressure	(4,225,838.37)	0.00	(4,225,838.37)	142,771.26	(1,569,432.58)	(5,652,499.69)	1,806,381.89	(3,846,117.80)
HRA Working Balance	(2,000,000.00)		(2,000,000.00)	0.00	0.00	(2,000,000.00)	0.00	(2,000,000.00)
Un-ringfenced	(2,000,000.00)	0.00	(2,000,000.00)	0.00	0.00	(2,000,000.00)	0.00	(2,000,000.00)
Total HRA Reserves	(6,225,838.37)	0.00	(6,225,838.37)	142,771.26	(1,569,432.58)	(7,652,499.69)	1,806,381.89	(5,846,117.80)



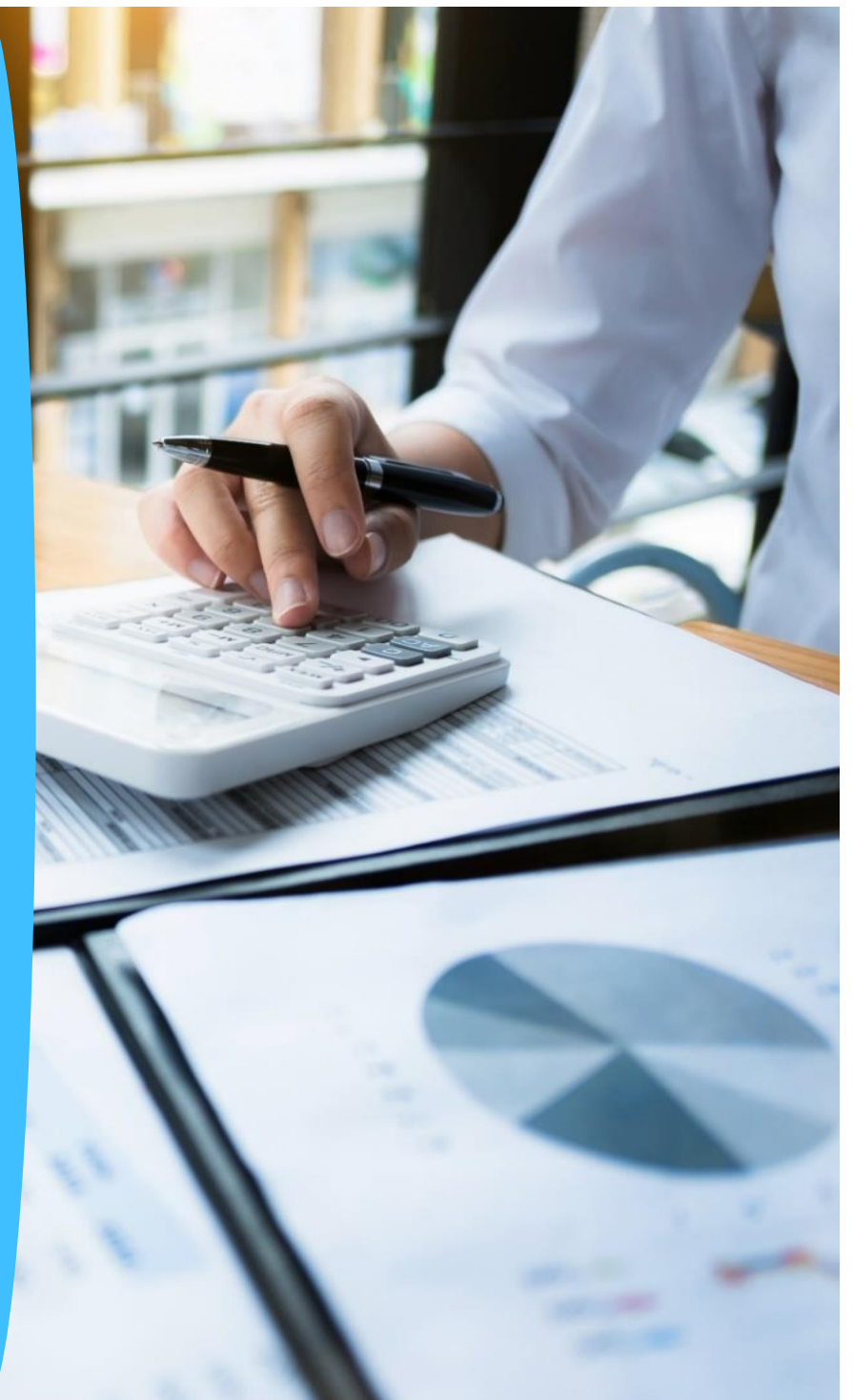


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beyond the expected

## Nottinghamshire Pension Fund

### (3) Newark & Sherwood District Council

IAS19 Report as at 31 March 2025



## Introduction

We have been instructed by Nottinghamshire County Council, the administering authority to the Nottinghamshire Pension Fund (the Fund), to undertake pension expense calculations in respect of pension benefits provided by the Local Government Pension Scheme (the LGPS). These benefits are provided to employees of Newark & Sherwood District Council (the Employer) as at 31 March 2025. We have taken account of current LGPS Regulations, as amended, as at the date of this report.

This report should be read in conjunction with the 31 March 2025 accounting briefing note. The figures contained in this report are in respect of the Employer's pension obligations under the LGPS as at 31 March 2025. IAS19 also requires the disclosure of any other employer provided pension benefits which are not paid from the Fund itself. We have only valued such additional liabilities, which would not be covered in the formal LGPS valuation, to the extent that they have been notified to us and are as disclosed in the data section of this report.

[Please use this link to access the 31 March 2025 accounting briefing note if you have not obtained a copy.](#)

The LGPS is a defined benefit statutory scheme administered in accordance with the Local Government Pension Scheme Regulations 2013 and currently provides benefits based on career average revalued earnings. Full details of the benefits being valued are as set out in the Regulations and summarised on the LGPS website.

This report is addressed to the Fund, and is provided in our capacity as Fund Actuary to the Fund. The report may be shared with the Employer, provided that it is shared in its entirety, but it does not constitute advice to them. The Employer may also share the information contained in this report with their auditor, but BW neither assumes nor owes any duty or responsibility to any third party who relies on that information. Any liability to any third party is expressly disclaimed to the fullest extent permitted by law.

Barnett Waddingham does not provide, and shall not be responsible for, accounting or audit advice. From time to time, we may comment or otherwise give an opinion on any information, documentation, and/or guidance provided to us by or on behalf of the Fund. The Fund shall not rely on any such comment or opinion to make (or refrain from making) any decision or take (or refrain from taking) any action.

This report reflects our understanding of the relevant accounting and audit standards in force at the date of this report. It complies with Technical Actuarial Standard 100: General Actuarial Standards (TAS 100) as issued by the Financial Reporting Council (FRC).

Please note that we have incorporated an asset ceiling into the Employer's balance sheet. Further details of the approach taken are given later in this report.

This report supersedes previous versions of this report and has been updated to reflect the actual whole fund asset information at 31 March 2025, which wasn't available when the initial report was requested. We have also allowed for the inflation experience up to March 2025 (compared to the previous report in which inflation experience was allowed for up to February 2025). This report has also been revised to remove some typographical errors throughout the document.

We would be pleased to answer any questions arising from this report.



**Lucy Byrne FIA**  
**Actuary**

## Data used

We have used the following items of data which we received from the administering authority and the Employer via the use of MS Forms:

Results of the latest valuation as at	31 March 2022
Results of the previous IAS19 report (v3) as at	31 March 2024
Fund asset statement as at	31 March 2025
Fund income and expenditure items to	31 March 2025
Employer income and expenditure items to	31 March 2025
Details of any new unreduced early retirement payments to	31 March 2025
Details of any settlements to/from the Employer for the period to	31 March 2025

The data has been checked for reasonableness, including consistency with previous valuation data where relevant, and the data is within tolerances for the purposes of this report.

Although some estimation of the data to the accounting date may be required, we do not believe it is likely to be significant to the results in this report.

We have not been notified of any significant changes or events since we received the data.

## Employer membership statistics

The table below summarises the membership data at 31 March 2022 from the latest valuation for members receiving funded benefits, and as at 31 March 2022 for any members receiving unfunded benefits.

Member data summary	Number	Salaries/Pensions £000s	Average age (salary/pension weighted)
Actives	552	14,192	46
Deferred pensioners	808	1,863	51
Pensioners	771	4,632	72
Unfunded pensioners	87	175	80

## Employer payroll

The total pensionable payroll and projected payroll for the Employer is set out below and is based on information provided to us by the administering authority. This has been used to calculate the service cost and projected service cost respectively.

Estimated payroll for the year to 31 March 2025	£19,810,000
Projected payroll for the year to 31 March 2026	£20,217,000

## Scheduled contributions

The table below summarises the minimum employer contributions due from the Employer to the Fund over this inter-valuation period. The Employer may pay further amounts at any time. Future contributions may be adjusted on a basis approved by us.

	Primary rate	Secondary rate for period beginning:			Minimum employer contributions due for the period beginning:		
		1 Apr 2023	1 Apr 2024	1 Apr 2025	1 Apr 2023	1 Apr 2024	1 Apr 2025
Total percent of payroll	18.6%	0.0%	0.0%	0.0%	18.6%	18.6%	18.6%
plus monetary amount (£000s)		459	477	495	459	477	495

## Funding approach

The Employer currently participates in the Newark & Sherwood District Council pool with other employers in order to share experience of risks they are exposed to in the Fund. At the 2022 valuation, the deficit for the whole pool was calculated and allocated to each employer in proportion to their value of liabilities. The next reallocation will be carried out at the 2025 valuation, should the Employer remain in the pool. Each employer within the pool pays a contribution rate based on the cost of benefits of the combined membership of the pool.

## Assets

The return on the Fund (on a bid value to bid value basis) for the year to 31 March 2025 is calculated to be 3.78% based on the Fund asset statements and Fund cashflows as set out in the Data section preceding this section.

The Employer's share of the assets of the Fund is approximately 1.92%.

The estimated asset allocation for the Employer at 31 March 2025 and 31 March 2024 is as follows (noting that due to rounding they may not total 100%):

Asset breakdown	31 Mar 2025		31 Mar 2024	
	£000s	%	£000s	%
Public Equities	72,294	52%	81,967	60%
Gilts	11,580	8%	3,246	2%
Other bonds	8,971	6%	6,724	5%
Property	14,296	10%	14,409	11%
Cash/temporary investments	7,595	5%	8,160	6%
Inflation Plus	9,647	7%	6,894	5%
Infrastructure	10,219	7%	9,799	7%
Private Equities	4,855	3%	4,340	3%
<b>Total</b>	<b>139,457</b>	<b>100%</b>	<b>135,539</b>	<b>100%</b>

The table below sets out the percentages of the Fund's assets held in each asset class at 31 March 2025 (split by those that have a quoted market price in an active market, and those that do not).

Asset breakdown		31 March 2025	
		% Quoted	% Unquoted
Fixed Interest Government Securities	UK	3%	-
	Overseas	-	-
Index Linked Government Securities	UK	5%	-
	Overseas	-	-
Corporate Bonds	UK	2%	-
	Overseas	5%	-
Equities	UK	15%	0%
	Overseas	37%	-
Property		-	10%
Private Equity		-	3%
Infrastructure		-	7%
Unit Trust Infl Linked		-	7%
Credit		-	3%
Cash/Temporary Investments		-	2%
Net Current Assets	Debtors	-	0%
	Creditors	-	-0%
<b>Total</b>		<b>67%</b>	<b>33%</b>

We do not have any further detail on the current asset allocation of the Fund; we suggest that if further information is required the administering authority is contacted in the first instance.

## Actuarial methods and assumptions

Details of the actuarial methods and derivation of the assumptions used can be found in the 31 March 2025 briefing note issued alongside this report unless noted otherwise below. The key assumptions used are set out below.

Financial assumptions	31 Mar 2025	31 Mar 2024	31 Mar 2023
	p.a.	p.a.	p.a.
Discount rate	5.80%	4.90%	4.80%
Pension increases (CPI)	2.90%	2.90%	2.90%
RPI inflation	3.20%	3.25%	3.30%
Salary increases	3.90%	3.90%	3.90%

Projected unit method is used in our calculations.

We have allowed for actual ONS CPI inflation observed between February 2024 and March 2025. This is reflected in the Experience loss/(gain) on defined benefit obligation figure in the results.

We have adopted a set of demographic assumptions that are consistent with those used for the most recent Fund valuation, which was carried out as at 31 March 2022, except for an update of the CMI projection model. Details of the post retirement mortality assumption are set out below; further details of the demographic assumptions adopted can be found in the briefing note corresponding to this report, and the Fund's actuarial valuation report.

Post retirement mortality	31 Mar 2025	31 Mar 2024
Base table	S3PA	S3PA
Multiplier (M/F)	115% / 110%	115% / 110%
Future improvements model	CMI_2023	CMI_2022
Long-term rate of improvement	1.25% p.a.	1.25% p.a.
Smoothing parameter	7.0	7.0
Initial addition parameter	0.0% p.a.	0.0% p.a.
2020 weight parameter	0%	0%
2021 weight parameter	0%	0%
2022 weight parameter	15%	25%
2023 weight parameter	15%	n/a



The assumed life expectancies, based on the assumptions set out above, are set out in the table below:

Life expectancy from age 65 (years)		31 Mar 2025	31 Mar 2024
Retiring today	Males	20.4	20.4
	Females	23.3	23.3
Retiring in 20 years	Males	21.7	21.7
	Females	24.7	24.7

#### Employer duration

The estimated Macaulay duration of the Employer's liabilities as at the accounting date using the assumptions set out above is 15 years.

### Past service costs

Past service costs arise if member benefits are introduced, withdrawn or changed. For example, an award of additional discretionary benefits such as added years by a member would be considered a past service cost. We are not aware of any additional benefits which were granted over the year ending 31 March 2025.

### Curtailments

Over the year, we understand that one former employee became entitled to unreduced early retirement benefits. The capitalised cost of the additional benefits on IAS19 compliant assumptions is calculated at £14,000. This figure has been included within the service cost in the statement of profit and loss.

### Settlements

We are not aware of any liabilities being settled at a cost materially different to the accounting reserve during the year, which has been confirmed by the Fund.

## Results

Balance sheet	As at 31 Mar 2025 £000s	As at 31 Mar 2024 £000s	As at 31 Mar 2023 £000s
Net pension asset in the statement of financial position			
Present value of the defined benefit obligation	130,966	145,832	143,192
Fair value of Fund assets (bid value)	139,457	135,539	125,110
<b>Deficit / (Surplus)</b>	<b>(8,491)</b>	<b>10,293</b>	<b>18,082</b>
Impact of asset ceiling	15,357	-	-
Unrecognised past service cost	-	-	-
Present value of unfunded obligation	1,379	1,549	1,649
<b>Net defined benefit liability / (asset)</b>	<b>8,245</b>	<b>11,842</b>	<b>19,731</b>
The amounts recognised in the profit and loss statement	Year to 31 Mar 2025 £000s	Year to 31 Mar 2024 £000s	
Service cost	3,503	3,386	
Net interest on the defined benefit liability / (asset)	476	853	
Administration expenses	68	61	
<b>Total loss / (profit)</b>	<b>4,047</b>	<b>4,300</b>	

For the purposes of our calculations, we distribute Fund administration expenses amongst the employers in the Fund in proportion to their individual asset shares.

Remeasurement of the net assets / (defined benefit liability) in other comprehensive income	Year to 31 Mar 2025 £000s	Year to 31 Mar 2024 £000s
Return on Fund assets in excess of interest	(1,512)	4,573
Other actuarial gains / (losses) on assets	-	-
Change in financial assumptions	19,871	2,367
Change in demographic assumptions	382	2,034
Experience gain / (loss) on defined benefit obligation	(64)	(793)
Changes in impact of asset ceiling	(15,357)	-
<b>Remeasurement of the net assets / (defined benefit liability)</b>	<b>3,320</b>	<b>8,181</b>

Investment expenses are included in return on Fund assets in excess of interest.

Reconciliation of opening & closing balances of the present value of the defined benefit obligation	Year to 31 Mar 2025 £000s	Year to 31 Mar 2024 £000s
<b>Opening defined benefit obligation</b>	<b>147,381</b>	<b>144,841</b>
Current service cost	3,489	3,386
Interest cost	7,090	6,856
Change in financial assumptions	(19,871)	(2,367)
Change in demographic assumptions	(382)	(2,034)
Experience loss/(gain) on defined benefit obligation	64	793
Liabilities assumed / (extinguished) on settlements	-	-
Estimated benefits paid net of transfers in	(6,579)	(5,147)
Past service costs, including curtailments	14	-
Contributions by Scheme participants and other employers	1,289	1,198
Unfunded pension payments	(150)	(145)
<b>Closing defined benefit obligation</b>	<b>132,345</b>	<b>147,381</b>

The experience loss/(gain) on the defined benefit obligation includes £64,000 in respect of the allowance for actual CPI inflation over the accounting period.

Reconciliation of opening & closing balances of the fair value of Fund assets	Year to 31 Mar 2025 £000s	Year to 31 Mar 2024 £000s
<b>Opening fair value of Fund assets</b>	<b>135,539</b>	<b>125,110</b>
Interest on assets	6,614	6,003
Return on assets less interest	(1,512)	4,573
Other actuarial gains/(losses)	-	-
Administration expenses	(68)	(61)
Contributions by employer including unfunded	4,324	4,008
Contributions by Scheme participants and other employers	1,289	1,198
Estimated benefits paid including unfunded net of transfers in	(6,729)	(5,292)
Settlement prices received / (paid)	-	-
<b>Closing fair value of Fund assets</b>	<b>139,457</b>	<b>135,539</b>

Investment expenses are included in actual return on assets in excess of interest.

Reconciliation of change in impact of asset ceiling	Year to 31 Mar 2025 £000s	Year to 31 Mar 2024 £000s
<b>Opening impact of asset ceiling</b>	-	-
Interest on impact of asset ceiling	-	-
Actuarial losses / (gains)	15,357	-
<b>Closing impact of asset ceiling</b>	<b>15,357</b>	-

The asset ceiling is the present value of any economic benefit available to the Employer in the form of refunds or reduced future employer contributions. Our calculation of the asset ceiling has followed our interpretation of IFRIC14.

Our calculations assume that:

- The Employer does not have a right to a refund of surplus at the level required by the accounting standard. Any surplus recognised is based on the economic benefit from a reduction in contributions.
- The Employer is a scheduled body and assumed to participate indefinitely.
- The requirement for the employer to make contributions to the Fund is considered to be a minimum funding requirement (MFR). For the period beyond the existing Rates and Adjustments certificate, our best estimate is that the existing rates remain in force. This is based on the fund actuary's methodology which is designed to provide a stable contribution rate, and also the lack of any other readily available figure.

In broad terms our analysis shows that:

- The potential economic benefit from the reduction in future contributions has been calculated to be nil. Since this is less than the unadjusted net asset of £8,491k, the initial impact of the asset ceiling is £8,491k.
- The Employer is currently paying deficit contributions towards a funding deficit. We have assessed this minimum funding requirement and calculate that it constitutes an onerous funding commitment. There is an additional liability of £6,866k to be recognised.
- The unadjusted funded surplus is £8,491k. There is an initial impact from an asset ceiling of £8,491k, plus an additional liability of £6,866k. The final funded net asset to be recognised is -£6,866k.
- In addition, there is an unfunded liability of £1,379k. The final deficit to be recognised is £8,245k.

Sensitivity analysis	£000s	£000s	£000s	£000s	£000s
<b>Adjustment to discount rate</b>	<b>+0.5%</b>	<b>+0.1%</b>	<b>0.0%</b>	<b>-0.1%</b>	<b>-0.5%</b>
Present value of total obligation	123,595	130,514	132,345	134,220	142,180
Projected service cost	2,174	2,506	2,596	2,689	3,091
<b>Adjustment to long term salary increase</b>	<b>+0.5%</b>	<b>+0.1%</b>	<b>0.0%</b>	<b>-0.1%</b>	<b>-0.5%</b>
Present value of total obligation	132,963	132,467	132,345	132,224	131,750
Projected service cost	2,596	2,596	2,596	2,596	2,596
<b>Adjustment to pension increases and deferred revaluation</b>	<b>+0.5%</b>	<b>+0.1%</b>	<b>0.0%</b>	<b>-0.1%</b>	<b>-0.5%</b>
Present value of total obligation	141,804	134,150	132,345	130,582	123,917
Projected service cost	3,111	2,693	2,596	2,503	2,156
<b>Adjustment to life expectancy assumptions</b>	<b>+1 Year</b>		<b>None</b>		<b>- 1 Year</b>
Present value of total obligation	137,047		132,345		127,827
Projected service cost	2,688		2,596		2,506
<b>Projected pension expense</b>	Year to 31 Mar 2026 £000s				
Service cost	2,596				
Net interest on the defined liability / (asset)	352				
Administration expenses	68				
<b>Total loss / (profit)</b>	<b>3,016</b>				
<b>Employer contributions</b>	<b>4,255</b>				

These projections are based on the assumptions as at 31 March 2025. The figures exclude the capitalised cost of any early retirements or augmentations which may occur after 31 March 2025.

## Appendix - auditor data pack

### Introduction and Background

In preparing the accounting report under IAS19 for Newark & Sherwood District Council's participation in Nottinghamshire Pension Fund, the Barnett Waddingham actuary is acting in their capacity as Management's Expert as defined by IAS(UK)500.

Newark & Sherwood District Council's auditor will generally need to receive sufficient appropriate audit evidence to carry out the audit. This is particularly the case with actuarially calculated values, which are considered to be accounting estimates under ISA(UK)540. The auditor will wish to evaluate the appropriateness of the Barnett Waddingham actuary's report as audit evidence (IAS(UK)500), and may engage the services of an Auditor's Expert to do so (ISA(UK)620). The Auditor's Expert will have specific knowledge of defined benefit pensions and will often wish to carry out substantive analytical procedures as referred to in ISA(UK)330 and ISA(UK)520.

While our main accounting report aims to meet Newark & Sherwood District Council's reporting and disclosure requirements under the relevant accounting standard, it may not provide all information required by the Auditor's Expert to carry out all procedures required by the relevant auditing standards. This often leads to detailed requests to Management's Expert for additional data items.

The purpose of this Appendix is to provide, at the outset, many of the additional data items often requested. This should streamline the overall audit process by providing the required additional data in a single report, reducing the number of additional data queries flowing via the Fund. The following data supplements the information in the main accounting report and should be read in conjunction with it. We do not expect this report to be audited - it is provided to aid in the audit of main report.

### Data

This additional data is ultimately based on the results of the last triennial valuation as at 31 March 2022 on which the accounting results are based. Some of the statistics are derived using approximate methods, but we expect that they will be suitable for the intended purpose, which is to carry out approximate rollforward and rebase calculations to verify the results quoted in the main report.

The data items provided are in respect of the Employer's pension obligations under the LGPS as at 31 March 2025, or the prior year comparator.

## Results

### Past and future service liability duration information

Duration, including definition (years)	As at 31 Mar 2025	As at 31 Mar 2024	Change over the period
Overall Macaulay duration <sup>(1)</sup>	14.8	16.0	(1.2)
Overall modified duration <sup>(2)</sup>	14.4	15.7	(1.3)
Active (Final Salary) modified duration	18.5	19.7	(1.2)
Active (CARE) modified duration	22.6	24.2	(1.7)
Active (PUM) modified duration	24.1	26.1	(2.0)
Deferred modified duration	19.0	20.4	(1.5)
Pensioner modified duration	9.6	10.3	(0.6)
Unfunded modified duration	6.9	7.2	(0.3)
CPI-linked modified duration	13.8	15.0	(1.3)
FS-linked modified duration	18.5	19.7	(1.2)

<sup>(1)</sup> The Macaulay duration is the weighted average term to maturity of the benefit cashflows

<sup>(2)</sup> The Modified duration is the sensitivity of the present value of the benefit cashflows to a change in discount rate

All duration calculations use the accounting assumptions at the respective date - the change over the period is due to the change in assumptions.

### Liability split information

Approximate proportion of total past service liability in each main category	As at 31 Mar 2025	As at 31 Mar 2024
Active (Final Salary) liability	13%	14%
Active (CARE) liability	12%	13%
Deferred liability	22%	23%
Pensioner liability	52%	49%
Unfunded liability	1%	1%
CPI-linked liability	87%	86%
FS-linked liability	13%	14%

Please note that these splits of liability are based on actual cashflow projections as at the last valuation date. We have not made any allowance for member movements or liabilities being extinguished in these estimated splits. We have allowed for the change in financial assumptions which applied at the relevant dates shown in the table above.



Approximate proportion of total liability split by gender	Proportion of liability female
Active (Final Salary) members	48%
Active (CARE) members	53%
Deferred members	51%
Pensioner members	43%
Overall membership	48%

Splits quoted are as at the last valuation. Liability weighted statistics use accounting assumptions at the last valuation date.

Average age information	Weighted by salary	Weighted by pension	Weighted by liability
Active members	46.4	51.2	50.7
Active (Final Salary) members		53.7	53.2
Active (CARE) members		49.4	48.4
Deferred members		51.0	51.0
Pensioner members		71.9	67.5

Tranche average retirement age	Weighted by pension	Weighted by liability
Active members	65.0	65.1
Active (Final Salary) members	64.0	64.0
Active (CARE) members	65.9	66.0
Deferred members	63.2	63.0

Ages quoted are as at the last valuation. Liability weighted statistics use accounting assumptions at the last valuation date.

## Allowance for actual inflation

Detailed information on CPI statistics for known inflation allowance	Statistic date	Statistic value	Rate p.a.
Latest known CPI (start)	February, 2024	132.3	
Latest known CPI (end)	March, 2025	136.5	
Assumed inflation over period (CPI)			2.90%

## Asset information

Value of assets (£000s) and asset share	As at 31 Mar 2025	As at 31 Mar 2024
Total fund assets	7,256,162	7,018,789
Employer assets	139,457	135,539
Employer asset share	1.922%	1.931%

## Service cost information

	As at 31 Mar 2025	As at 31 Mar 2024
Employer service cost as % of salaries	12.5%	17.2%
Employee contributions as a % of salaries	6.5%	6.5%

Employee contribution rates are assumed to remain stable between full valuations. Please note that the current service cost in the current accounting period will be based on assumptions which applied at the opening position, and not based on assumptions at the closing position. If the employer has treated any events as special, the current service cost will have been remeasured at each event date.

## Asset ceiling

### Detailed breakdown of key results used in the asset ceiling calculation

		£000s
Gross funded liability	(a)	130,966
Gross funded assets	(b)	139,457
Funded accounting surplus (deficit) before asset ceiling	(c) = (b) - (a)	8,491
Present value of service cost including expenses	(d)	145,679
Present value of primary contributions	(e)	205,645
Present value of negative secondary conts (if any)	(f)	-
Present value of positive secondary conts (if any)	(g)	6,866
Economic benefit available from a reduction in contributions	(h)*	-
Accounting asset (before additional liability)	(i) = min[(h) , (c)]	-
Additional liability from onerous funding commitment	(j)**	6,866
Accounting asset (after additional liability)	(k) = (i) - (j)	(6,866)
<b>Impact of asset ceiling</b>	(l) = (c) - (k)	15,357
Gross unfunded liability	(m)	1,379
Final accounting asset that can be recognised (after unfunded liability)	(n) = (k) - (m)	(8,245)
Period over which service cost is considered		Infinite
Period over which primary contributions are considered		Infinite
Period over which negative secondary contributions are considered		n/a
Period over which positive secondary contributions are considered		16.0 years

\*(h) =  $\max[(d) - [(e) - (f)], 0]$  if an MFR is assumed to apply, otherwise (h) = d

\*\* (j) =  $\max[(g) - \max[(h) - (c), 0], 0]$  for IAS19 only, otherwise (j) = 0



Report to: Policy and Performance Improvement Committee - 30 June 2025

Director Lead: Deborah Johnson, Director - Customer Services & Organisational Development

Lead Officer: Rowan Bosworth-Brown, Senior Transformation & Service Improvement Officer

Report Summary	
<b>Report Title</b>	Community Plan Performance for Quarter 4
<b>Purpose of Report</b>	To present the Quarter 4 Community Plan Performance Report (1 January – 31 March 2025)
<b>Recommendations</b>	That the Policy & Performance Improvement Committee review the Community Plan Performance Report attached as <b>Appendix 1</b> and the Compliance report attached as <b>Appendix 2</b> .

## 1.0 Background

- 1.1 We continue to deliver an approach to performance that is used to drive improvement rather than being simply used as a counting device. We are doing this by analysing data and progress against key activities as well as building a picture of the context of performance using district statistics, customer feedback and workforce information.
- 1.2 The development of this report details the Quarter 4 performance and includes activities delivered within the quarter.

## 2.0 Proposal/Options Considered

- 2.1 That the Policy & Performance Improvement Committee review the Community Plan Performance Report (**Appendix 1**) and the Compliance Report (**Appendix 2**).

## 3.0 Implications

In writing this report and in putting forward recommendations, officers have considered the following implications: Data Protection, Digital and Cyber Security, Equality and Diversity, Financial, Human Resources, Human Rights, Legal, Safeguarding and Sustainability, and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

## Background Papers and Published Documents

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

None



NEWARK &  
SHERWOOD  
DISTRICT COUNCIL

# Community Plan Performance Report

2024 – 25 Q4

1 January to 31 March 2025



# Introduction

We at Newark and Sherwood District Council aim to do everything we can to enable local residents and businesses to flourish and fulfil their potential, as well as encourage visitors to enjoy all that our area has to offer. How we intend to achieve this purpose is laid out in our **Community Plan**. This plan was informed by the views of residents and lays out the Council's ambitions over four years as well as the activities that will help achieve these ambitions. Our 2023-27 Community Plan is in place, and this is underpinned by our performance framework. This framework sets out how we will measure the performance of our ambitions and contains key performance indicators, a combination of qualitative and quantitative data.



This report examines how the Council has been performing against the Community Plan. It examines data to look at the performance of key services and delivery against the activities outlined in the plan. This report examines the Council's performance and achievements from 1 January to 31 March (Quarter 4).

We know the value of understanding our performance as this knowledge allows us to embed and disseminate good practice and quality service delivery, as well as identify and tackle areas for improvement. The Council's performance is measured in four parts;



## 1. Our District

A basket of data indicators which allow us to examine how our district is performing in key areas, acting as a form of 'health check'.

**Page 3**



## 2. Our Customers

A look at what our customers are telling us about the services they receive and insight into how we are learning from customer feedback.

**Page 5**



## 3. Our Performance

How we are delivering against the objectives we outline in the Community Plan.

**Page 10**



## 4. Our Workforce

To understand how the Council's staff are performing and how we are supporting staff. This is important as a positive and motivated workforce is more likely to be high performing.

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# Our District

## About Newark and Sherwood (2021 Census)...



A resident population of 122,956 (14.9% of Nottinghamshire's population).

There are 53,332 dwellings in the district, 38.5% are owned outright, 31.3% are owned with a mortgage or loan, 13.9% are socially rented, 16.3% are private rented around 10% directly owned by the Council.

92.7% of the district population were born in the UK.

60.5% of the district's population are working age (16 to 64), 17% are 16 years or younger and 22.4% of the population are over the age of 65. For those over the age of 65, this percentage has increase by 3.5% when compared to the 2011 census demonstrating a growing older population when compared to the 2021 census. In terms of socio-economic challenges, 16.2% of households do not own a car or van, 0.8% of households do not have a form of central heating and 19.1% of residents do not have any formal qualifications.

### Performance of our district

This data tells us something about our district in Quarter 4 (1 January to 31 March). Most of these indicators are not factors we can directly affect, only influence, but they add context to the work we undertake.

**Planning:** The number of planning applications we receive gives an indication of the level of construction planned in the district. The number of residential planning applications being received nationally continues to be low, reflected within our numbers when compared to corresponding period in previous years. The number of commercial planning applications being received nationally continues to be low, although locally, the figure for the year represents a 35% increase when compared to corresponding period in 2023/24.

As previously reported, it is anticipated that the lower numbers are as a result of the introduction of mandatory biodiversity net gain (introduced on 14th February 2024). Furthermore, it is assumed that there is a precautionary approach in the residential sector at present following change in Government. Noting potential government planning reforms and revised National Planning Policy Framework (NPPF), it is anticipated that planning applications for residential could rise over the next 6 to 12 months.

**Unemployment** is represented as a model-based percentage. It has remained static this quarter when compared to the same quarter in 2023/24, and is 0.2% lower than that of England which is 3.9% this quarter.

- Quarter 4 2023/24—3.7%
- Quarter 4 2024/25—3.7%

**Footfall:** the table below shows the average footfall figures for quarter 4 for Newark, Southwell, Edwinstowe and Ollerton. Footfall in all four locations increased when compared with the previous month, this is the second month in a row in which this has taken place. Visitor numbers now roughly align with the average visitor count that we experienced prior to the downturn at the end of 2024.

This could potentially be attributed to the warmer weather experienced during March, as well as initiatives such as the final Newark Creates event for 2024/25 - Fire, Flame and Frenzy Night on Saturday 1<sup>st</sup> March. This event was an interactive and immersive fire show in the Market Place, with a mini food festival and pop-up events alongside.

Average Daily Footfall				
	Newark*	Southwell	Edwinstowe	Ollerton
January 2025	6,279	1,974	2,000	2,203
February 2025	6,644	2,049	2,113	2,291
March 2025	6,864	2,118	2,276	2,391
Quarter 4 Average	6,596	2,047	2,130	2,295



Footfall in Newark on the day of the event was 21% higher than the average Saturday for 2025, whereas Market Place footfall was over 50% higher than the average footfall reported at this location. During the evening of the event 58.9% of recorded visitors to the Market Place were brand new to the town, which equates to around 670 brand new visitors not including those visitors who may not have a mobile phone, or those who may have been out of range of the sensors.

The largest percentage change in footfall has been in Edwinstowe, with March 2025 attracting the largest number of visitors since the sensors were installed in late September 2024. Edwinstowe has seen an increase in average daily footfall each month this quarter, with a 2.8% increase in January and 5.7% in February. This could be attributed to the more favourable weather conditions being experienced than is typical of this time of the year. One of the sensors in Edwinstowe is located at Sherwood Forest Corner, which is an outdoor destination and so likely to capture greater footfall during periods of fine weather conditions.

Fridays remained a popular visitor day, with Friday 21<sup>st</sup> March being the busiest day of the month in Newark, Ollerton and Edwinstowe. This was a day of warm, sunny weather which could have encouraged many people to pay visits into town following several months of colder temperatures and shorter daylight hours. Friday 28<sup>th</sup> March was the busiest day in Southwell, which was another day of warm weather. These spikes in visitor numbers aligns with the historic trend of more people making journeys to town centres once the Spring and Summer weather begins.



1. Fire, Flames and Frenzy Event in Newark Market Place





## Exploring our performance

In this section of the report, we look at a few key measures of customer interaction to monitor how we interact with our customers, and we look at what our customers are telling us about the services they receive. We analyse these comments and show how we are learning from customer feedback.

### Interactions with the Council — Service Demand

This information gives an indication of demand for council assistance **year to date**:

- **17,271** face-to-face contacts were held at Castle House, a 3.2% increase compared to the same period last year.
- **109,742** calls were received by the contact centre, a 3.3% decrease when compared to the same period last year.
- **26,676 calls** were received by responsive repairs, a 2.3% **decrease** when compared to the same period last year.
- **65,940 digital web form transactions** were completed by our customers, a 6% **increase** when compared to the same period last year.





## Customer Feedback

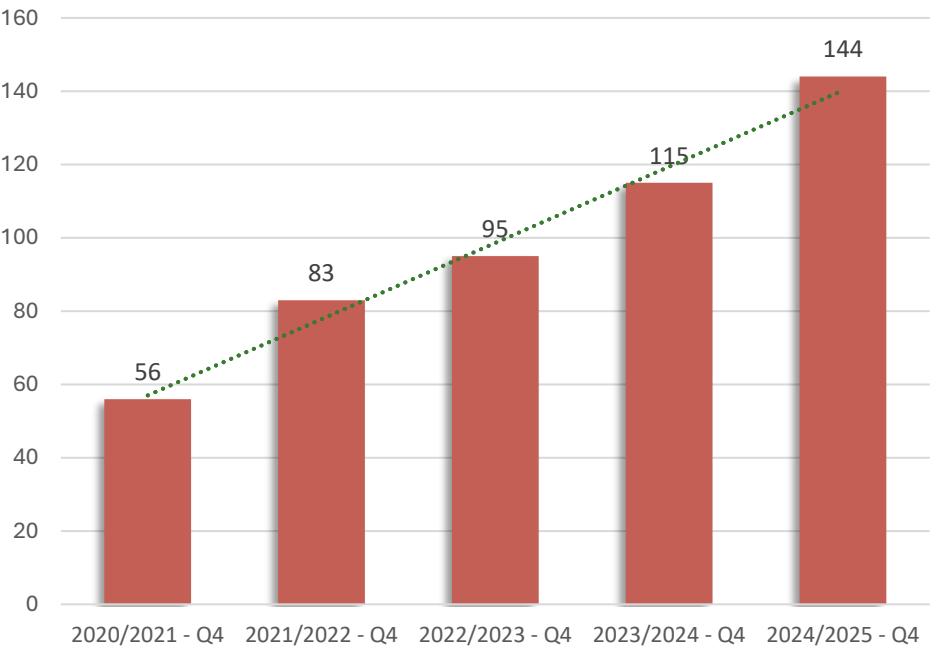
We value all feedback (both positive and negative) as it offers valuable insights into our customers' experiences. It helps us identify areas for improvement, supports continuous learning, and can serve as an early indicator of potential issues before they escalate into more significant challenges.

Because of its importance, we actively encourage our customers to share their feedback. This proactive approach, combined with recent changes to our complaint handling timelines (outlined below), has contributed to a noticeable upward trend in the volume of feedback received.

## Complaints Received

During Quarter 4 we received 144 Stage 1 complaints. The five-year trend, as illustrated in the chart below, shows a continued upward pattern in the number of complaints received during this period. Compared to Quarter 4 of 2023/24, this represents a 25% increase.

This rise reflects broader efforts—both locally and nationally—to make it easier for people to raise complaints, especially in the Housing sector. In response, we have updated our Customer Complaints and Feedback Policy, including revised acknowledgment and response timescales, to ensure compliance with the Housing Ombudsman Complaint Handling Code. We have recently completed working with our software provider to ensure these changes were integrated into our complaints handling software.



# Customer Feedback



## Complaints by Business Unit

**Housing Maintenance & Asset Management** received 68 Stage 1 complaints in Quarter 4 of 2024/2025. Most related to conduct and service quality (35) and delays in service or communication (23). The remaining complaints covered missed actions, contractor work standards, and one report of dangerous driving.

**Environmental Services** received 29 Stage 1 complaints during the period. The main issues were service delays (9) and conduct (6), with smaller numbers relating to missed actions, responsiveness, contractor standards, and communication.

**Housing & Estates Management** received 21 Stage 1 complaints in the period. The most common issues were related to contractor work standards (6) and service delays (5). Other complaints included concerns about conduct and service (7 combined), and communication delays (3).

The remaining complaints were spread across several other service areas, including Revenues & Benefits, Corporate Property, Planning & Development, Housing Income & Leasehold Management, Financial Services, Public Protection, Law & Information Governance, and Communications, each contributing a smaller proportion to the overall total. This feedback highlights key areas for improvement and supports ongoing efforts to enhance the customer experience.

Business Unit	Complaints Received	Complaints Received
Housing Maintenance & Asset Management	68	47.2%
Environmental Services	29	20.1%
Housing & Estates Management	21	14.6%
Revenues & Benefits	10	6.9%
Corporate Property	5	3.5%
Planning & Development	4	2.8%
Housing Income & Leasehold Management	3	2.1%
Financial Services	1	0.7%
Public Protection	1	0.7%
Law & Information Governance	1	0.7%
Communications	1	0.7%
<b>Grand Total</b>	<b>144</b>	<b>100.0%</b>

*Includes complaints which were subsequently withdrawn*



## Response Times

During Quarter 4, a total of 144 complaints were submitted, of which 7 were withdrawn and 1 was suspended, leaving 136 active complaints. Of these, 69 complaints (approximately 51%) were responded to within the target timescale of 10 working days.

The Business Unit with the highest number of complaints was Housing Maintenance & Asset Management, accounting for nearly half, 68 of the total, but only 21 of these were resolved on time. Environmental Services followed with 29 complaints, 19 of which were timely. Several units, including Revenues & Benefits and Communications, resolved all their complaints within the timeframe.

No of complaints (Per BU)	On time	Overdue	Total
Communications	1	-	1
Corporate Property	4	1	5
Environmental Services	19	10	29
Financial Services	1	-	1
Housing & Estates Management	9	7	16
Housing Income & Leasehold Management	3	-	3
Housing Maintenance & Asset Management	21	46	67
Planning & Development	1	2	3
Public Protection	-	1	1
Revenues & Benefits	10	-	10
Total	69	67	136

It is not unusual that the customer facing business units typically receive a higher volume of complaints due to the nature of the work being carried out by these teams and in the case of Housing Maintenance and Asset Management, how intrinsically linked this service is to the lives and homes of our tenants. We encourage all customers to provide feedback to us, whether positive or negative, and because of this feedback we recognise that this is an area in which improvement is required. We have recruited complaints a co-ordinator to help this business unit with ensuring complaints are responded to in time, also enabling officers to focus on rectifying service failures and implementing improvements. Additionally, we are taking steps to increase the level of resources within the business unit for identified pinch points. Some of these complaints also relate to the performance of our contractors and we are working with them to improve their services and response times.

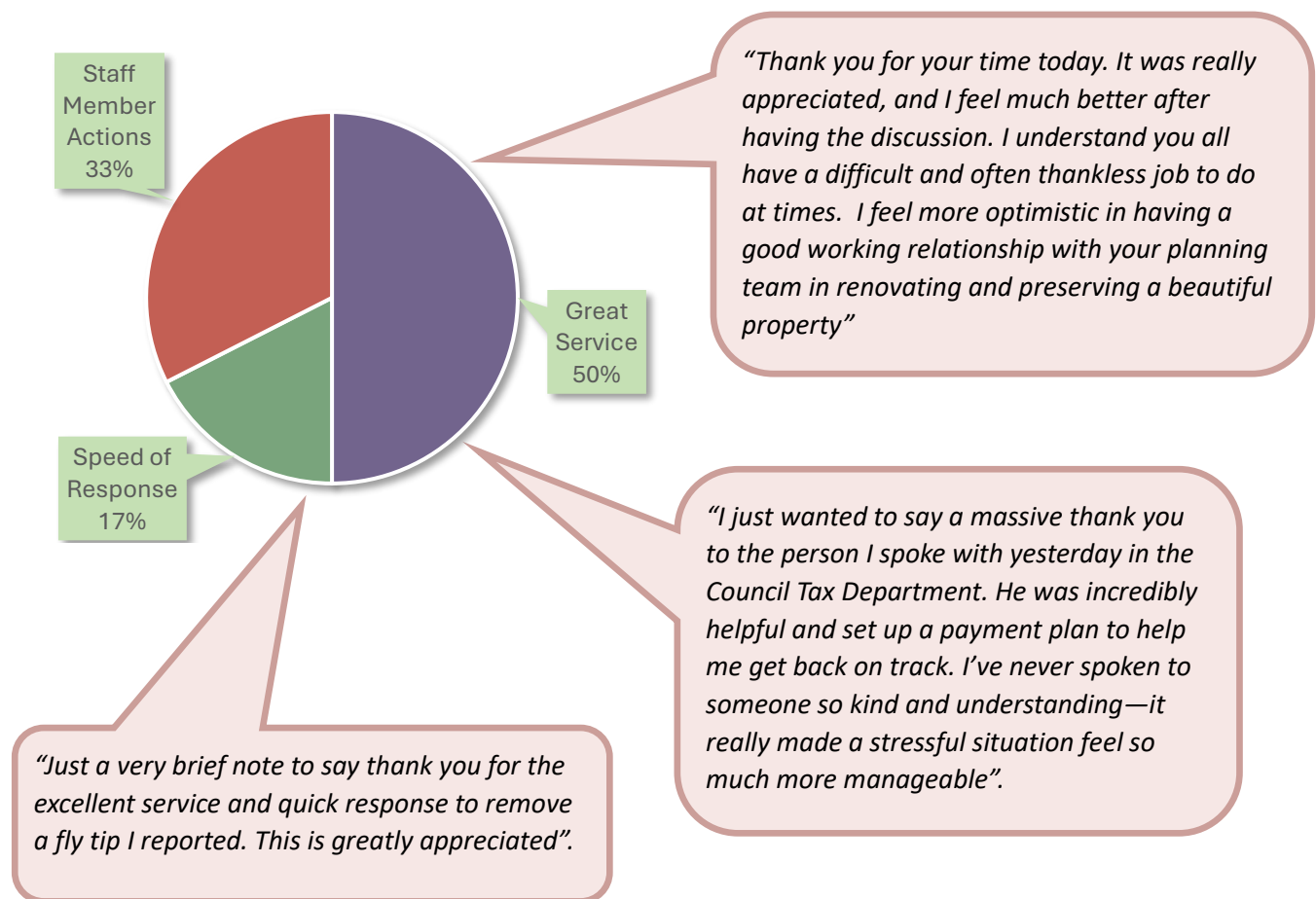
We anticipate a reduction in the volume of complaints being received and better performance in complying with the response times to all complaints being received by the end of June 2025. This is monitored weekly and monthly within the Housing, Health & Wellbeing Directorate and remains a priority for the teams affected and our Housing Assurance Board.

# Customer Feedback



## Praise

Of the 40 positive comments received for Quarter 4, the most frequent theme was “Great Service” with 20 mentions, followed by “Staff Member Actions” with 13, and “Speed of Response” with 7. Customer Services received the highest number of compliments overall (13), particularly for staff actions and great service. Environmental Services also stood out with 10 positive mentions, mainly for great service and response speed. Other departments such as Planning & Development, Housing Maintenance & Asset Management, and Housing & Estates Management received a mix of praise across all three themes, though in smaller volumes. This suggests that while great service is the most appreciated aspect, recognition of individual staff actions also plays a significant role in positive customer feedback



# Improve Health & Wellbeing



During Quarter 4, we have been working to deliver activities that align with the objectives outlined in our Health and Wellbeing Strategy. Our strategy focuses on several key areas, including identifying and reducing health inequalities within our district. There is a wide range of activities underway across the Council, our partners, and our district to increase access to services and support, enhance access to parks and green spaces, provide safe cycle routes, and improve air quality and aesthetics. This quarter's outputs include:

The design and implementation of a **Changing Places** style facility at the Dukeries Leisure Centre, aimed at enhancing accessibility for all residents, was successfully completed in February 2025. The changing facility is now fully operational and available for use by visitors.



## Implement our 'Health and Wellbeing Strategy':

- We attended two task and finish groups organised by health partners across Mid-Notts around vaccinations and immunisations and transport this Quarter. With issues identified in conversation we have agreed these groups should have more of a place-based focus, with the health improvement team now leading on Newark and Sherwood task and finish groups on vaccinations and immunisations and transport with local partners considering insight from our communities to improve both over the next year.
- We supported the community and voluntary service with the first Patient Participation Group (PPG) forum held since before the Covid-19 Pandemic. The purpose of PPG's is to help strengthen messaging within primary care settings and support patients within surgeries.
- This quarter we have funded and supported two additional 'make your own wormery' workshops at Reach Learning Disability charity. The groups each have benefited from a community wormery, however in addition to this each participant now has their own at home to better utilise food waste.
- A successful meeting was held with the Integrated Care Board to better understand both organisations' roles within health care provision across the district. A plan has been agreed to better utilise both networks to strengthen the communications and messaging our residents receive around health and wellbeing. The first campaign that was shared widely was the 'Pharmacy First' campaign.
- The Ageing Well group has identified several priorities of focus within the next year around the ageing well agenda, this group will now focus on carers, dementia, transport and more all of which will sit within the new 'Age Friendly Communities' action plan as we are applying to become an Age Friendly Community.
- We have appointed a volunteer to lead on the creation of the 'Big Green Book' which will locally support health partners to signpost patients to outdoor, nature-based activity.

**Pollution Prevention and Control Measures:** During Quarter 4 we have undertaken 3 Permit inspections, against a target of 2 scheduled for this quarter. Permit inspections are mandatory and ensures that we maintain our statutory requirement to conduct these inspections. They also ensure that we maintain our relationship with businesses and that businesses understand their responsibility under the Pollution Prevention Control regulation 2016. The Permit Inspections also ensure businesses are audited against their statutory environmental obligations and check their compliance with the permit conditions, and identify any improvements required. Greater environmental compliance in turn ensures benefits for the environment and



# Improve Health & Wellbeing



human health in terms of reduced emissions and health risks. 2 of the inspections carried out had follow-up actions requiring the submission of additional information following the inspection.

Funding for the **Playing Pitch Strategy** was secured in the 2024-2025 budget in the form of a capital contribution of up to £2m towards the delivery of 5 x 3G artificial pitches across the district. Additional funding from the Football Foundation is to be secured to support with the delivery of these pitches. The decision to prioritise the delivery of the 5 pitches was driven by data which identified artificial pitches as the greatest under supply across the district. During 2024-25, we have been working closely with potential landowners and school sites, along with the Football Foundation, to identify potential sites across the district.



**Support NHS partners:** A 'Wrap Around Care' presentation was given at the districts Best Start+ partnership group and led to early years careers with the team now being invited to attend the future first expo in November.

We also gave a presentation to all Year 9 Students at Newark Academy's Careers Week. As part of this presentation, we shared information with the young adults on career prospects within the Council and more widely the opportunities that exist locally in all areas of health and wellbeing including public health.

**Partnership working to reduce health inequalities in targeted areas and explore opportunities to increase local access to services and green spaces for all:**

- Work has continued to develop a large-scale community growing space in Balderton, supported by Grow Incredible CIC who recently received a community grant to secure the site alongside Balderton Primary Care Centre.
- Our Teams organised and attended 'Community Listening Training' which was well attended and was designed to support volunteers from our food projects. This valuable training will now enable these volunteers to support our local communities through enhanced listening skills and help them to empower others to build opportunities in our communities.
- At the recent Best Start+ meeting the attendees received a presentation from the Community Dental Service on oral health. Recent data shows that in Newark and Sherwood 'Five-year-olds tooth decay' fairs poorly proportionally with 20.3% of 5 year olds with visually obvious dental decay, in comparison to the County at 17.5%. A variety of training was offered to partners covering all age demographics and additional connections were made leading to the CDS presenting as part of the GRT programme at the YMCA, the impact of this was visible the following week with all the girls sharing they had quickly changed their habits around energy drinks and sugary drinks after realising the impact it was having on their oral health.
- Our teams have continued to run a series of successful cookery sessions to a variety of groups. Two further teens cookery courses have taken place with over 25 local young people attending in Hawtonville and Southwell. A number of sessions have been delivered to the CVS's Best Years Hubs supporting older people to batch cook affordable, easy and nutritious meals. Our next Teens cookery course is already fully booked and additional sessions have been organised to support tenants at De Lacy Court, Ollerton.

# Improve Health & Wellbeing



- A four week 'Fakeaways' course was successfully delivered in Edwinstowe and a 'Feed 4 £5' course was delivered at Beaumont Walk, Newark.

Our Council's **Warm Homes on Prescription scheme**, in partnership with Mansfield District Council, aims to help low-income residents with cold-sensitive long-term health conditions to achieve affordable warmth. This year, the project has directly supported 16 owner-occupied households by fully funding a range of home heating improvement measures, including replacing old broken-down boilers and leaking radiators. In addition, over 100 households have received advice and/or been referred to other relevant support services.

**Maximise take up of housing benefit, Council Tax support and other household grants to support residents financially:** During Quarter 4 we have continued to ensure that invites are issued to those residents not currently in receipt of localised council tax support but would likely qualify if they claimed. We saw 323 new claims made and awarded, as well as 92 new claims for housing benefit. The total of new claims for council tax support made during the year was 1,828, the total for new housing benefit claims was 413.

We have continued to prioritise **supporting residents through the ongoing cost of living crisis** and this year those efforts have included:

- Additional fuel vouchers to households in need
- Provision of food and hygiene products through the food clubs across the district
- Investment in a 'Food Coordinator' role to work across the food cycle – from growing, security of access to food and cooking and healthy eating
- Working with Newark Town Council to introduce a market start up grant for entrepreneurs
- Developing a 'Shop Local' gift card to support local businesses.

A further, ring-fenced budget of £139,650 for 2025-26 has been agreed at Full Council. This budget retains a focus on food, fuel and direct support to residents.

Negotiations are ongoing with **Southwell Leisure Centre** this quarter, to agree a solution for the long term management of the Centre.

The process to progress with **greening gateways to villages and towns has now been established** and we are working closely with Via East Midlands to achieve this. As the land is not owned by the Council, entrances at Bilsthorpe, Blidworth and Boughton have had plans approved with Nottinghamshire County Council Councillors. These were then sent on to the respective parishes for their consideration. Because of approval timelines and the planting window, only Boughton is scheduled to have the wildflowers sown in the first few weeks of April. The bulb mix of daffodils, snowdrops and bluebells will be added in spring 2026. Bilsthorpe and Blidworth will be scheduled for planting in spring 2026 alongside other village and town gateways identified and consulted on. Plans have and will be adapted to facilitate mowing schedules and access points during pre-planting site visits with the parishes. Boughton have other gateways and owned land that they would like to work together on greening. A meeting to discuss further sites is scheduled for April. The initiative has been well received and we look forward to the finished results.



# Improve Health & Wellbeing



Nottinghamshire County Council has developed a 15-year programme of potential **walking and cycling projects to improve infrastructure**, which includes 10 routes in Newark & Sherwood. Nottinghamshire County Council continues to progress design work on three schemes:

- A6075 Phase 1 (Ollerton to Ollerton Roundabout),
- B6034 (Edwinstowe to Rufford Country Park)
- B6030, Clipstone.

**Explore options to further develop parks in the district enabling free play and exercise, making sure the offer is as inclusive and as varied as possible:** This quarter we have continued our work to provide grass football pitches in Devon, with positive results as the grass pitches have held well and are maintaining a high percentage of grassed areas. This has been made possible due to the maintenance that we have continued to provide throughout Autumn and Winter, in accordance with FA guidelines. We have plans to begin trialing grass pitches at the young peoples center Hawtonville, which will provide more outdoor pitches for our communities to express themselves through sport.

Sconce and Devon Park hosted a visit by the Newark Allotment association where a number of guests from all allotments around Newark visited the halt to discuss plants, seeding and seed swapping and other initiatives. Composting continues to take place onsite with the new addition of wormeries now being created in a 240 ltr bin, seed collection, plant division, cuttings, and over winter ensured there is a more sustainable management plan for propagating plants and flowers. Over 8,000 people have been involved in events Sconce and Devon as well as Vicar Water Park, taking part in events such as Park Run, educational walks and talks as well as butterfly surveys. It has also been noted this quarter that species such as the greater spotted Woodpecker, Sky Lark, and Woodcock have been spotted in our parks by our rangers and residents.

Recently the Great British Spring Clean (GBSC) was very successful, with over 300 bags of rubbish and 250 volunteers in this one event, we have also distributed additional GBSC bags to volunteers who will be continuing to collect rubbish on a regular basis. One volunteer has picked over 100 bags in the past 6 weeks. Sherwood Heath Spring Clean also took place this quarter and saw 15 volunteers from friends of Sherwood Heath Group and Edwinstowe Litter Patrol taking part and collected over 20 bags of rubbish.

Over 1,150 trees have been planted around Newark and Sherwood locations include Clay Lane and Mead Way. We donated 50 saplings to two different primary schools for the development of their forest schools, species of trees include Birch, Beech, Hawthorne, Blackthorn, Oak, Cherry. There has also been a contribution to the planting of 19 different trees on Riverside Park, Newark to replace the trees removed from Newark Castle last October. This has been finished off with wildflower planting, with the aspiration that the Riverside Park could secure green flag status.



# Improve Health & Wellbeing



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Number of User Visits – Active 4 Today (all)	1,008,319	1,101,987	1,102,936	1,000,000
Number of DFG grants awarded	83	62	106	N/A
Number of aids and adaptations delivered in Council homes	New For Q1 24/25	New For Q1 24/25	897	N/A
<b>All Other Indicator Types</b>				
Live Leisure Centre membership base (all)	11,585	11,170	12,212	11,500
Leisure Services - based on your experience; how likely are you to recommend us to a friend, family member, or colleague?	New For Q1 24/25	New For Q1 24/25	60.0%	60.0%
Average number of calendar days to process new council tax support applications	18.8	12.8	12.7	14.0
Average no of calendar days to process council tax support change in circumstances	7.5	4.1	7.2	7.0
Total council tax support claimants	6,748	6,697	6,722	N/A
Average no of calendar days to process new housing benefit claims	18.1	14.5	14.4	14.0

# Improve Health & Wellbeing



Average no of calendar days to process housing benefit change in circumstances	2.6	1.5	1.6	4.0
Total housing benefit claimants	3,629	3,422	2,835	N/A
% of businesses in the District with a 0 star food rating (major improvement necessary)	0.18	0.09	0.20%	0.16%
% of businesses in the District with a food hygiene rating of 3 or higher (generally satisfactory or above)	92.67	98.00	97.70%	98.00%
<b>Annual Indicators</b>	<b>22/23</b>	<b>23/24</b>	<b>24/25</b>	<b>Target 24/25</b>
Customer satisfaction with leisure services (all)	New For 23/24 Q4	70.7%	87.0%	N/A

## Exploring Our Performance

**% of businesses in the District with a 0 star food rating (major improvement necessary)** - Businesses which are issued with low food hygiene ratings must make urgent (0-star) or major (1-star) improvements to hygiene standards. We have several enforcement options available, as well as a role to provide advice and guidance to make sure these improvements are made. We will also tell the business how quickly these improvements must be made, and this will depend on the type of issue that needs to be addressed. If we find that a business's hygiene standards are very poor and there is an imminent risk to public health, we will act to ensure consumers are protected. This could result in stopping part of the business or closing it down completely until it is safe to recommence. In Q3 we were performing below target and that equated to 1 business in the district which held a 0-star food hygiene rating, this quarter we have 2 businesses which now hold a 0-star food hygiene rating which means this indicator is exceeding its target. It is likely that by Q1 this will have seen an improvement in line with the target, as businesses which are issued with a 0-star rating can request a reinspection more quickly.



# Increase Supply, Choice & Standard of Housing



Housing is one of the most fundamental and pressing issues affecting the quality of life, well-being, and economic development of our district. We are committed to increasing the supply, choice, and standard of housing in Newark and Sherwood, ensuring that everyone has access to decent, affordable, and suitable homes. To achieve this, we have set out to modernise and improve our Housing Management Systems (HMS) and Repairs Processes, regenerate our housing stock, tackle homelessness, support refugees, and support on the provision of affordable homes.

We have made significant progress on the **Yorke Drive Regeneration Project** this quarter. The project has now secured reserved matters planning approval and a start onsite is anticipated in 2025. The project will deliver 207 new homes, of which a minimum of 74 will be affordable. Affordable housing is defined as housing for sale or rent, for those residents whose needs are not met by the housing market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the 4 following definitions set out within the National Planning Policy Framework.

We are continuing to engage with residents through both a newsletter and consultative panel alternating on a monthly basis.



CGI Illustration of Yorke Drive Regeneration

As part of our work to **develop and deliver a GRT strategy**, we have established a GRT partnership across a range of partners, which we also chair, including but not limited to representatives from fire and rescue, education, public health, police and HomeStart. The partnership is currently developing a Terms of Reference and has identified the following priorities:

- Engagement with the GRT Community – developing a GRT led forum/ GRT Voice with active members of the community.
- Developing communications channels – where key information specific to GRT needs can be shared e.g. recognising community specific issues related to school attendance, immunisation take up.
- Developing an alternative education provision for young people at risk of becoming NEET (not in employment, education or training). A pilot programme is currently underway utilising Shared Prosperity Funding.

As part of our ongoing efforts **to explore ways to improve energy efficiency in the private rented sector**, the Warm Homes Local Grant has had £1.1m confirmed indicative allocation for the Council over next 3 years to improve energy efficiency in the private rented sector, this scheme is being worked through to understand resources required for delivery.



# Increase Supply, Choice & Standard of Housing



We are working to progress the amended **'Allocations and Development Management Development Plan Document'**, which forms part of the districts Local Development Framework. Through the allocation of land for housing, employment and retail as well as the making of other designations, the plan seeks to help deliver the approach to the district's future development set through our Amended Core Strategy. In addition to assist with the day-to-day assessment of planning applications, the document also provides a suite of development management policies. The **'Allocations and Development Management DPD'** is currently being examined by a Planning Inspector, hearing sessions were conducted in November 2024 and a process of written representations is currently underway between Inspector and the Council. The **'Affordable Housing Supplementary Planning Documents'** remains pending the results of the Examination of the Amended Allocations & Development Management DPD. The Solar Energy Supplementary Planning Document is due to be considered by Cabinet in June 2025 for Adoption.

The **development of new homes for open market sale or rent through Arkwood Developments Ltd** continues this quarter:

- The 32-unit development at Manea, Cambridgeshire continues to progress well. The first homes were completed in late March 2025, including the show home, which is now operational. We have secured the first few sales on these homes and our first customer moved in at the end of March 2025.
- In Wirksworth, work on the construction of 30 new homes was initially hampered by wet ground conditions but is now progressing well. These will be going on sale by late spring with the first units due for completion by Summer 2025. Early marketing is taking place to stimulate interest ahead of the sales launch.
- The 50-unit site in Long Benington is still awaiting full planning consent. This is partially due to unexpected requirements from the urban designer at the Local Authority, as such it is forecast that the development will be a couple of months behind the original expected target dates. We are in the process of appointing a build partner and are now expecting works to commence in Summer 2025, subject to planning permission.
- The 132-unit site at Lowfield Lane is progressing as we are currently working through the discharge of planning conditions, which includes a range of further survey work, for example Archaeology. Alongside these works, we have commenced the procurement process for appointing a delivery partner, which in this instance is via a formal tender process. We are still expecting to commence on site by late Summer 2025, subject to a satisfactory outcome to the current tender process.
- Arkwood Developments are working closely with the Council on the delivery of the 29-unit development on Stodman St and expect to take possession of the rental units in Spring 2026. Work will commence on marketing these units in Autumn 2025.



# Increase Supply, Choice & Standard of Housing



We remain committed to a further phase of our **Council Housing Development Programme**, which will be Phase 6 and will deliver up to 50 further properties through direct delivery or appropriate acquisition. The approval by Cabinet aligned existing S106 Affordable Housing contributions to support financing of the scheme. The development programme currently has the following under construction/ due to start on site with planning approval:

- Three properties on South Drive, Newark
- Nine properties on Lowfield Lane, Newark
- Eight properties on Station View, Collingham
- Five properties on Bowbridge Road, Newark
- Five properties on Church Circle, Ollerton

The programme will also include the four units within the Ollerton Town centre regeneration taking the total identified to 34. A housing delivery report, detailing delivery for 2024-25 will be published in Q2 2025-26.

Housing **Stock Condition Surveys** with Council owned stock faced delays in Quarter 4 due to some resource issues caused by our Contractor experiencing challenges in recruiting surveyors. This is a sector wide shortage that is being experienced nationally. In addition to this our Contractor experienced an instance of long-term sickness within its workforce which has had a knock-on impact on the number of Stock Condition Surveys completed. It is anticipated that by the end of Quarter 2 25/26 we will have 85/90% of properties surveyed, however it is expected that the outstanding properties are those that are either refusing to allow us access to the property or choosing not to engage with the process.

Once we have a clear picture of how many properties this is, we will contact tenants individually to understand barriers to access.

We are currently involved in the commissioning of Derby City Council to undertake a desktop stock condition survey within the private rented sector, this project is ongoing with the initial results expected in 8 – 12 months. This project will provide essential data on the condition of the owner/occupied and private rented property within our district.

**Continue to respond to additional and emerging demands for the resettlement of refugees:** In Quarter 3 we were advised by Government that the Ukrainian Permission Extension (UPE) was scheduled to go live in February 2025 and has since commenced. We have 30 host placements live this quarter, which has remained consistent since Quarter 3. The scheme enables Ukrainian nationals and their eligible family members who continue to require sanctuary in the U.K to apply for further permission to remain for up to 18 months. There have been amendments to the Afghan resettlement schemes this quarter. With the consolidation of the schemes into a single pipeline – the Afghan Relocations and Assistance Policy (ARAP) and Afghan Citizens Resettlement Scheme (ACRS) have been combined to become the Afghan Resettlement Programme (ARP). From 1st March 2025 all new arrivals under the ARP will be provided with transitional accommodation for up to nine months. With the need for additional bedspaces, the Government have requested Local Authorities support with the procurement of transitional accommodation. For the East Midlands Authorities that means the provision of 390 bedspaces. We are working with neighbouring local authorities and the East Midlands Strategic Migration Partnership to ensure a coordinated approach to resettlement.

**The revised Housing Allocation Scheme** is being implemented alongside the roll out of the new Housing Management System, NEC. During Q4 the details of the scheme have been loaded into the NEC system and is currently undergoing testing, we are aiming to go live with Allocations in NEC by Summer 2025.

# Increase Supply, Choice & Standard of Housing



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Responsive Repairs - telephony - average length of time to answer call (seconds)	90.3	161.0	137	60.0
Number of calls received by Responsive Repairs call handlers	26,763	27,292	26,676	Demand
Number of all tenants who have been evicted for rent arrears	2	1	3	N/A
Number of residential planning applications	178	153	124	N/A
Number of commercial planning applications	22	11	17	N/A
Number planning applications - major	77	54	32	N/A
Number planning applications - non-major	999	784	745	N/A
Number of private housing disrepair complaints received	New For Q1 24/25	New For Q1 24/25	102	N/A
Number of notices issued relating to private rented properties	New For Q1 23/24	4	1	N/A
Number of repairs reported online	New For Q1 24/25	New For Q1 24/25	735	N/A
<b>All Other Indicator Types</b>				
% of planning applications (major) determined in time	90.0%	92.3%	33.0%	90.0%
% of planning applications (non-major) determined in time	93.4%	94.4%	93.6%	90.0%

# Increase Supply, Choice & Standard of Housing



All Other Indicator Types				
Average time spent in temporary accommodation (weeks)	8.8	11.6	10.9	13.0
Average time to re-let Council properties (days)	28.0	30.9	44.3	28.0
Amount of current arrears as a % of annual rent debit	1.31%	1.47%	2.08%	2.10%
% of rent collected from current tenants as a % of rent owed	99.0%	98.9%	97.7%	98.5%
Amount of current rent arrears	£324,310	£382,744	£602,406	£500,000
Average "End to End" time for all reactive repairs (calendar days)	21.2	16.6	29.45	16.0
% of repairs completed at first visit	88.4%	91.1%	88.4%	93.0%
% of homes with a valid gas certificate	98.8%	99.7%	98.3%	100.0%
% of homes with Electrical Installation Condition Report (EICR) certificates up to five years old	99.0%	99.3%	99.3%	100.0%
Number of homes delivered through our housing development company Arkwood	55	79	89	N/A
Number of plots commenced to date through our housing development company Arkwood	87	87	149	N/A
Arkwood - forecast pre tax profit for the year	New For Q1 24/25	New For Q1 24/25	£77,000 Loss	N/A
Number of long term empty properties in the district	New For Q1 24/25	New For Q1 24/25	864	N/A



# Increase Supply, Choice & Standard of Housing



Annual Indicators	22/23	23/24	24/25	Target 24/25
Overall Satisfaction (TP01)	New For Q4 23/24	77.9%	77.0%	79.0%
Satisfaction that the landlord listens to tenant views and acts upon them (TP06)	New For Q4 23/24	68.0%	67.0%	69.0%
Satisfaction that the landlord makes a positive contribution to neighbourhoods (TP11)	New For Q4 23/24	65.1%	72.0%	72.0%
Number of dwellings committed or under construction	6,732	7,991	7,460	6,500
Affordable homes completed	36	127	118	N/A
Number new homes developed within HRA	7	38	22	30
Number of dwellings completed	588	629	564	683

## Exploring Our Performance

**The average time to re-let Council properties** (days) continues to be an area that improvement is required, and we have seen that re-let times have gradually declined each quarter this year. Operational challenges are being experienced within this service, including a backlog of empty homes which has been compounded by the stream of additional properties becoming vacant. We're actively working on driving improvement in this service area and Empty Homes is the first area of focus for the newly created Housing Performance and Improvement Board. A specific workstream has been created to address areas for improvement and development. Additional resources and external contractors are in place for Quarter 1 25/26 to address the backlog of empty homes, whilst the in-house team retaining focus on the business-as-usual intake of empty homes

**Amount of current rent arrears**, we are seeing a significant number of customers migrating to Universal Credit from legacy benefits which results in larger balances accruing on accounts. In addition, with 2024/25 being a 53-week rent year, the additional weekly rent debit will have impacted on the year outturn. We have had staff challenges during the year which has resulted in resources being stretched. We have now recruited to key roles and have put additional resource in place to support with the migration of tenants to Universal Credit.

**Overall Satisfaction (TP01)** has a slight variance on the previous year. Overall performance is closely linked to satisfaction with repairs, which has also decreased since last year. A Tenant Satisfaction Measures action plan is in place to address improvements, and a housing performance and improvement board has been implemented from April 2025, led by the Chief Exec, Director of Housing, Health and Wellbeing and the Portfolio Holder for Housing.

**Satisfaction that the landlord listens** to tenant views and acts upon them (TP06) has seen a 1% decrease on the previous year. Our tenant engagement team carry out a range of engagement activities throughout the year, as do the wider housing service. We aim to involve tenants more in our consulting and decision making and have recently done some work with TPAS to identify improvements. These will be implemented across the next financial year.

**Arkwood Developments** are slightly behind on target completions at Manea which has been due to some site issues. The issues have now been resolved with our delivery partner, and we are expecting the programme to fall back into line in the next couple of months. This has not impacted upon completed sales and future sales reservations.

## Raise peoples' skills levels & create employment opportunities for them to fulfil their potential



The **Infrastructure Delivery Plan** identifies infrastructure projects required to support development in the district. In 2017 the Council identified the A1 Overbridge between Balderton and Fernwood as its highest priority project to be delivered via CIL funding. National Highways, on our behalf, have appointed Amey to undertake the next stage of the A1 Overbridge project. This stage analyses the 8 options identified by WYG in July 2019 A1 Overbridge Feasibility Study. It is expected that this assessment phase will be complete in mid 2025 and will inform the design and procurement stages of the project. The design and procurement stage will allow for detailed costings for the project to be drawn up based on the preferred design solution.

Community Infrastructure Levy monies are required to assist in the delivery of the flood alleviation highway improvement scheme on Tolney Lane, Newark. This will support the delivery of Gypsy Roma Traveller housing provision.

In terms of section 106 funding, most policies relating to sites that are allocated for development in the local plan include site-specific infrastructure requirements. The Infrastructure Funding Statement provides an annual update on infrastructure delivery in the district. Projects have also been identified in other Council documents, including the Playing Pitch Strategy and the Active Travel Study. We have also negotiated with National Highways on their A46 Improvement Scheme. National Highways is seeking to working proactively to promote local employment opportunities.

The **UK Shared Prosperity Fund (UKSPF) and Rural England Prosperity Fund (REPF)** programme came to an end this quarter, in accordance with the 3 year spend requirements. The total of £4.2m funding awarded over the 3 year period was paid by the end of March 2025, with projects completing on time. We are now are undertaking evaluation of the overall programmes delivery, including a review of outputs and outcomes achieved, with support from key delivery partners. In February, we were notified of an extension to UKSPF for 25-26, resulting in a further £1.5m (UKSPF/REPF combined) for the 12 month period, to enable a continuation of key programmes and support services whilst longer term funding plans are considered by Government.

The plans to **redevelop the Clipstone Holdings site** were presented to the Planning Committee in March and the plans were approved unanimously. We are now in the process of finalising tender documents with an aim to go out to tender by end of April 2025 and a further update can be expected in Quarter 1.

The **new Sustainable Economic Growth Strategy (SEGS)** data and evidence pack was provided to members in early March 2025 following three workshops. The next steps will include a period of consultation with members on the draft strategy, the action plan will be completed and aligned to the Business Plan, before then a period of consultation with key stakeholders begins. It is anticipated that a completed SEGS will be presented to Cabinet with a recommendation for approval in Autumn 2025.

The **Programme for Newark Creates 2025-26** has been developed, following a successful funding bid from the Newark Cultural Consortium to the Arts Council England £79,000 was awarded. We are working with We Are Newark to work up proposals to enhance our current funding and deliver additional events later in the year. There are a number of events scheduled to take place beginning in June 2025, of which we will share further updates about in future quarters once the events have taken place.

As part of our aspiration to **promote the market for arts, culture and creative industries**, a freelance music co-ordinator has been appointed to lead the next six months' work on 'Alive with Music'. The first Forum meeting was hosted at the National Civil War Centre and generated much discussion and ideas for progression.

Raise peoples' skills levels & create employment opportunities for them to fulfil their potential



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Total number of people supported to access education or training through UKSPF	New For Q1 24/25	New For Q1 24/25	234	N/A
Number of businesses receiving non-financial support (e.g. 1-2-1/workshops)	New For Q1 24/25	New For Q1 24/25	244	N/A
Number of work experience placements offered at differing levels of education within NSDC	New For Q1 24/25	New For Q1 24/25	28	N/A
Number of apprenticeships commenced at all educational levels within NSDC	New For Q1 24/25	New For Q1 24/25	4	N/A
<b>All Other Indicator Types</b>				
Newark Beacon - % of occupied units	99.1%	80.0%	79.0%	88.0%
Commercial Property - % occupied units	98.0%	98.0%	96.3%	95.0%
Sherwood Forest Arts and Crafts - % of occupied units	100.0%	100.0%	95.0%	95.0%
Newark town centre footfall count (average visitors per day)	New Q3 23/24	6,497	6,596	7,000

## Raise peoples' skills levels & create employment opportunities for them to fulfil their potential



Annual Indicators	22/23	23/24	24/25	Target 24/25
New jobs created within the district	52,000	56,441	62,100	40,000
Number of new businesses as a percentage of business births to active enterprises	9.6%	10.6%	8.5%	10.0%
% of students within the district achieving LEVEL 1 - GCSEs 1-9 and lower or NVQ level 1	83.6%	90.6%	87.4%	85.0%
Percentage of town centre retail premises vacant across the NSDC District	6.8%	7.2%	9.2%	8.0%
Number of businesses receiving grant funding (UKSPF or other)	New For Q4 24/25	New For Q4 24/25	0	N/A

### Exploring our performance

**Newark town centre footfall count** (average visitors per day) has been influenced by fewer trips into Newark during January, potentially as a result of families cutting back in spending after the Christmas period, as well as rising cost of household bills. Poor weather has also prevented trips into the town centre due to flooding and road closures. The Newark & Sherwood Gift Card Scheme has recently been launched and we are hopeful this will encourage footfall in town. Our teams are working with HATCH to develop the Newark Heart FBC to be able to regenerate the town centre. Alongside this, we are planning town centre events such as the fire show to encourage more visitors into the town.

The number of **new businesses as a percentage of business births to active enterprises** is an indicator which we report on annually, this data is aged by the point we can report on it as the data we're reporting is for the year 2023. During which the cost-of-living crisis was impacting the spending habits of customers and spend was falling in town centres, impacting the profits of many local businesses. Increases in the rate of inflation, the cost of energy and materials, as well as import / export difficulties with Europe were significantly impacting the abilities of businesses to trade and maintain productivity. Support has been commissioned from Nottinghamshire County Council to provide advice and guidance to businesses. A business support programme is currently being planned for businesses to learn about new trends and form strategies to build growth and resilience. We expect to see improvement in 2025-26.

# Reduce Crime and Anti-Social Behaviour



We understand that crime and anti-social behaviour (ASB) can significantly impact the quality of life of our residents and communities and are committed to working with our partners and stakeholders to implement a range of measures and strategies to prevent and tackle crime and anti-social behaviour and improve the feelings of safety and well-being across our district.

We have been working to assist in the delivery of **'Rural Crime and ASB Prevention'** with additional target hardening at Sherwood Forest Corner. This quarter saw the recent addition of Dark Sky Compliant Street lighting, along with a new security system at The Arts and Crafts Centre to compliment the CCTV installed in 2024. It is anticipated this will significantly contribute towards reductions in ASB and rural crime with improved signposting and enhanced public security.

## **Partnership working to identify and intervene with cases of anti-social behaviour:**

We have received complaints which have been concerned with individuals' street drinking and causing nuisance in Newark, which could in part be attributable to the weather having been warmer than average for this time of year. To address this, we have been working in partnership with the police and utilising CCTV footage, to identify those individuals and take enforcement action. To bolster our ability to take enforcement action against this type of anti-social behaviour, last Summer we carried out a review of our Public Space Protection Orders (PSPO) which resulted in the coverage of the Alcohol PSPO for Newark town centre having been widened to cover a wider geographical area and the requirements strengthened. In addition to this, the Police are actively working in this area, with 3 x Community Protection Warnings issued, with 1 escalated to Community Protection Notice. Our Community Protection Officers are also carrying out regular patrol and monitor these key locations.

## **Targeted action against known crime and anti-social behaviour hotspots:**

- In September 2024, an injunction was secured on an individual causing nuisance on Yorke Drive. This quarter, the individual was brought before the Courts for 4 breaches of the injunction and received an 8-week custodial sentence. The terms of the injunction were extended to include a non-association order with an associate whom the individual regularly committed crime and anti-social behaviour with, particularly on the Yorke Drive estate.
- Also this quarter, 2 Closure Orders on Yorke Drive were extended by a further 3-month period.
- Yorke Drive has remained an area of multi-agency focus following this further enforcement action. Regular targeted patrols continue to take place, to offer continued reassurance to the community and to monitor for any breaches on the enforcement action to date.
- Our Community Protection team completed 80 hours of dedicated hot spot patrols in Newark Town Centre and Hawtonville.

Our teams actively promote the reporting of anti-social behaviour and use of schemes such as **Pub Watch and Shop Watch** during their regular patrols and interactions within the community. This quarter through the Newark Pub Watch, it has been reported that a known individual has returned to the Town, causing nuisance in town centre licensed premises. This intelligence has been shared with relevant agencies.

As part of our ongoing work to review and **improve infrastructure to reduce crime and anti-social behaviour and improve feelings of safety**, the lighting groundworks at St Mary's gardens have been completed this quarter, with the columns now in place awaiting delivery of the lights themselves. Columns are due to be installed and commissioned in Quarter 1 of 2025/26. A new CCTV column has been erected within the garden area and the camera will be installed when the electrical work for the lights is complete.

We utilised hotspot funding to replace the redeployable camera on Wilson Street with a permanent solution, which has now been installed.



# Reduce Crime and Anti-Social Behaviour



We continue to work collaboratively to deliver a **co-ordinated approach to Public Protection, Housing and Estate Management and Environmental Services.**

Outside of normal day-to-day joint working, our teams are working together to problem solve issues of crime, anti-social and environmental issues on and in the vicinity of Byron Close, Newark.

Our work continued this quarter to **reduce the number of environmental crimes committed** by increasing visibility and enforcement in targeted areas.



In Quarter 4 we issued:

- 44 fixed penalty notices for fly tipping
- 16 fixed penalty notices for littering
- 6 fixed penalty notices for waste transfer notes
- 5 fixed penalty notices for fly posting
- 3 fixed penalty notices for breach of Public Space Protection Orders
- 12 Community protection notices

District Enforcement issued 10 fixed penalty notices this quarter, before their decision to terminate the contract with the Council with effect from 31st January 2025. District Enforcement cited inflationary pressures and rising employment costs and as such the procurement process for a new provider is underway.

The property on Rufford Road, where a Section 59 notice has been issued has now been secured using funding from the PCC and the site has been cleared by the Environmental Services Team. We have invoiced the landowner to recover the costs and will start court proceedings if unpaid.



We have 11 prosecution cases being processed for considering for fly tipping, Duty of Care and failure to provide information and 3 court issued arrest warrants out on individuals who did not attend court. We've also successfully progressed prosecutions this quarter, with 2 cases being heard in court and all resulted in fines being issued to the three individuals involved totalling £3,004.00

When new projects are underway, actively seek out ways to involve residents in aspects of their design and development, thereby increasing a local sense of ownership and mitigating against the risk of vandalism and damage. This quarter we met with the **Nottinghamshire Police Designing Out Crime Officer** to discuss known issues being experienced on the A617 Rainworth bypass. The issues include objects being thrown from a footbridge at vehicles passing beneath posing a danger to drivers and their passengers. As well as car meets gathering in two laybys on the A617, with cars race each other along the stretch of road between Mansfield, Rainworth and the A614 roundabout. The footbridge marginally falls into Mansfield district, but the surrounding households fall into Newark and Sherwood, hence our input in community impact. The outcome of this meeting included a number of suggestions having been put forward and considered. There is a countywide Police Operation in place called Op Wheelspin which is dedicated to car cruising/racing and the Rainworth Bypass has been added to their patrol areas.

# Reduce Crime and Anti-Social Behaviour



Our Community Plan sets out our commitment to **complete a programme of target hardening to protect vulnerable sites from unauthorised encampments**. Unauthorised encampments are dealt with efficiently guided by the Unlawful Encampment Policy. We are working to develop a further process to ensure a consistent approach and timeline to remove individuals and property that is unlawfully on land owned by the Council. We are working to strike the right balance to allow the sites to be accessible to the public whilst providing sufficient security to deter encampments.

We work to maximise the **use and effectiveness of CCTV footage captured** around the district each quarter in order to bring offenders to justice. There were 31 positive outcomes resulting from usage of CCTV this quarter; 8 in January, 16 in February and 7 in March. The CCTV Control Room were proactive in identifying 64 incidents and reacted to 216 requests from Police or Council Officers.

Our Anti-Social Behaviour team identified 2 individuals involved in graffiti and vandalism on Sherwood Avenue Park, which resulted in formal warnings and a 6-month exclusion from the park.



## Re-deployable cameras:

- The decision has been taken to relocate the re-deployable CCTV located on Churchill Drive, Newark, as no further reports have been received in this location. Through the ASB Hotspot Funding, target hardening of shop premises has taken place, to include deterrents on the roof of one of the retail premises, where previously children and young people have accessed and caused nuisance.
- Utilising ASB Hotspot Initiative funding, permanent CCTV will replace the re-deployable CCTV sited at the junction of Wilson Street, Kings Road and Slaughterhouse Lane, Newark. This temporary CCTV is one that is well used by the police to gain evidence of criminal activity in this area.
- The CCTV sited in Kneesall village will remain in place until further notice.

We have re-stocked our trail cameras this quarter, beginning to utilise a new trail cam to gradually replace the current models with better quality 24 megapixel cameras. These cameras do not emit a glow and this is designed to make it harder for offenders to find and destroy or steal these cameras. Initial testing has now been conducted and we think they will prove to be a valuable new tool.

**The Community Safety Partnership (CSP) Delivery Plan** describes specific actions to help deliver the objectives of the Bassetlaw, Newark & Sherwood CSP Community Safety Strategy. The actions are split into the four strategic themes, which prevents duplication and allows cross-over of the many crime and thematic areas. Individual thematic plans have been incorporated into the main document to allow for more effective delivery and monitoring. It will include all statutory duties and agreed actions across the many countywide partnerships and is a flexible working document that can be added to and amended.

# Reduce Crime and Anti-Social Behaviour



This quarter we continued our work with partners to **provide creative diversionary activities for young people**. As well as continuing to encourage interventions at an early stage through education in schools and assisting families in need of support. Some of the events we supported this quarter have included:

- Our teams delivered sessions for 129 students from Years 3, 4, 5 and 6 at Bishop Alexander Academy, Newark this quarter. The sessions were designed to educate the students about what anti-social behaviour is, what the consequences of acting in this way can be, and the affects it can have on others within their community.
- Sessions within Bilsthorpe Young People's centre were delivered and focused on advising young members of the community on the impact and consequences of behaving in an anti-social manner.
- The ASB Panel continues to meet each month and within this quarter, 5 young people have been referred into the Panel.
- A graffiti event took place at St Mary's C of E Primary School in Edwinstowe; engaging Year 5 and Year 6 students, who choose a "love, flourish, learn" design for their graffiti mural. This event was made possible because of the Police Crime Commissioner's Locality Funding and has received praise from both staff and students alike.
- Newark Academy hosted sessions by Extreme Wheels, which was also made possible due to being supported by Locality Funding. 30 Year 8 students took part in the sessions which focused on teamwork, resilience and understanding how to make positive choices in the community to keep themselves and eachother safe.
- We funded the 'Prison Me No Way' workshop and was delivered to 250 Year 9 and Year 10 students at Suthers School, Newark. Prison Me No Way is a registered charity, providing bespoke sessions into educational facilities, providing real life learning experiences for young people to raise awareness of consequences, risky decision making, and prevent them becoming involved in crime and antisocial behaviour. The workshop focused on choices and explored how a decision you make can impact not only your life but those of your family and friends too. Students got to meet some current serving prisoners, hear their stories and ask them questions as well as see a to-scale prison cell.
- A further graffiti project took place in March on Coronation Street Park with local young people designing a teamwork and sports themed piece of graffiti art. Balderton 2<sup>nd</sup> Girl Guides contributed significantly in delivering the artwork on the day, alongside local young people who visited the park and were offered the opportunity to join in. This project was the final delivery under Safer Streets 5 project.





# Reduce Crime and Anti-Social Behaviour



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Fixed penalty notices for fly tipping (number issued)	New For Q1 24/25	New For Q1 24/25	142	N/A
Number of fixed penalty notices issued for all environmental offences (excluding fly tipping)	New For Q1 24/25	New For Q1 24/25	833	N/A
Community protection notices/warnings (number issued)	8	20	29	N/A
Number of positive outcomes resulting from CCTV intervention	New For Q1 23/24	No Data Rec'd	176	N/A
Number of evictions (anti-social behaviour)	3	1	5	N/A

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	County Comparison
% reduction in anti-social behaviour - Newark & Sherwood District compared against County area	2.0%	17.0%	16.1%	10.9%
% reduction in all crime - Newark & Sherwood District compared against County area	-9.0%	-2.0%	0.0%	4.9%

### Exploring our performance...

We have seen a 16.1% reduction in anti-social behaviour compared to County which has seen a 10.9% reduction and therefore we have seen a greater reduction. We found that the % reduction in all crime remained flat this quarter, but the County saw a reduction of 4.9% and therefore performed more favourably.

## Protect & Enhance the District's Natural Environment and Green Spaces



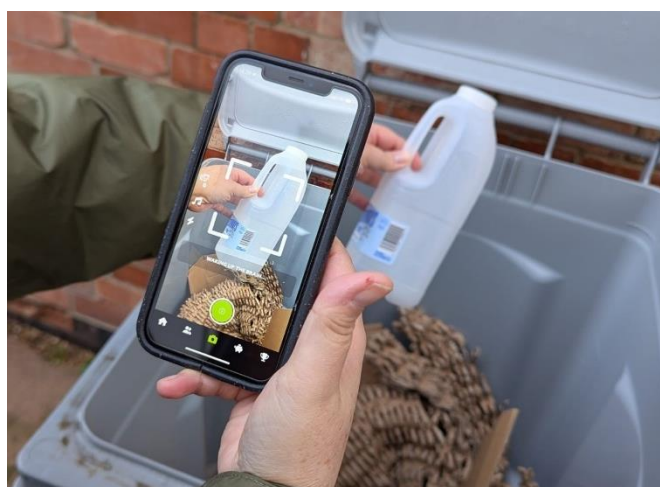
The natural environment and green spaces of our district are vital assets for our residents, visitors, and wildlife. They provide a range of benefits such as improving health and well-being, mitigating climate change, and enhancing biodiversity. As a local authority, we are committed to protecting and enhancing these assets through various initiatives and actions, as outlined below.

### Community Engagement and Recycling Initiatives:

**Recycling Application:** Last quarter LitterLotto® was launched in the district and this initiative which is designed to help everyone recycle right and keep neighbours clean and tidy, has been embraced by residents. We have seen an increase in users from 50 upon launch last quarter, to just over 5000 at the end of this quarter. Every correctly disposed item qualifies for local and national prize draws, with a guaranteed monthly £100 Jackpot up for grabs and we have had 3 lucky winners this quarter.

Alongside promoting LitterLotto® on our social media channels, we have distributed QR code stickers on recycling bins to advertise the At-Home recycling side of the app. To date, 12,947 recyclable items have been recorded using the app and 7,677 pieces of rubbish have been recorded as being disposed of in street bins.

Street bin stickers have been placed on our communal rubbish bins in areas with high foot traffic to promote binning rubbish on the go. More are scheduled to go out with our Street Scene team.



**The Contaminated Bin Review** took place last quarter and saw 415 bins recorded as having been contaminated. We have developed a number of actions as a result of the reviews findings which will help to educate our communities about what can and cannot be recycled, addressing those commonly misdisposed of items.

- **Recycling Leaflet** - We have created a leaflet which will be distributed in areas that were identified as having contaminated waste as part of the review. The leaflet provides a clear outline of what can and can't go in the silver recycling bin, suggesting places where some of the commonly incorrectly recycled items can be disposed of and is due to be distributed in Quarter 1 25/26.
- **Recycling Events** – We are arranging events for residents with the purpose of providing advice on items that are not recyclable, sharing information about where commonly misrecycled items can be disposed of, promote the use of LitterLotto, and share updates on government changes, known as 'Simpler Recycling', for residents in April 2026. We held the first of these events at Southwell Market on Saturday 15th February and we spoke to around 30 people across the morning.
- **Redesigned Contamination Sticker** - We redesigned our contamination sticker to make it more accessible. It focuses on items that commonly contaminated the recycling bins during the review period. Waste Operatives are now circling the items on the sticker which are contaminating the bins so that residents have instant feedback on why their bin was rejected.

## Protect & Enhance the District's Natural Environment and Green Spaces



**Resident Newsletter:** The last two monthly Resident newsletters have featured information about recycling to help with different recycling needs. This is scheduled to become a regular feature to assist with recycling trickier items and to promote how to reduce and reuse items before they need to be recycled. In February the focus was to share information on contaminants from the bin review and March focused on the recycling of items commonly disposed of from bathrooms.

**Digital Resources for Schools:** Due to the government changes to recycling, known as 'Simpler Recycling', schools who generate the extra waste streams must begin recycling these items. As such, we provided an update to our digital resources to accommodate the changes for those schools who have signed up for 'Simpler Recycling' collections, including the collection of food waste.

### Community Events:

- On Saturday 1st February, the National Civil War Centre's 'Family Saturday' took place and used the opportunity to educate on recycling with families through games. Around 60 children took part in the games to win prizes for recycling right.



- On Monday 3rd February, we attended a Young Carers evening in Hawtonville to promote the reuse of items and provide games on how to recycle right at home. The young people created bug hotels from cartons, plastic bottles and natural materials. They took away a 'how to' guide which also detailed the insects their hotels may attract. We were unable to attend the Young Carers Session in Ollerton, we provided the equipment needed to replicate the session.

- On Tuesday 18th and Thursday 20th February, we held sessions in Vicar Water Country Park and the National Civil War Centre. One session focused on showing children how to make bug hotels, by reusing plastic bottles and cartons. The other session focused on how to make natural bird feeders and children left with instructions on how to make both at home and which insects and birds their items would attract. A total of 150 children took part in the two sessions across both sites.





## Protect & Enhance the District's Natural Environment and Green Spaces



- During February half term, we ran a scavenger hunt at both Sconce and Devon Park and Vicar Water Country Park. The hunt covered a range of items that could be seen and heard in each park. Around 60 children took part across both parks.

The brand new state-of-the-art skatepark, refreshed play area and highly requested water play zone at **Sherwood Avenue Play Park** was completed this quarter, ahead of the grand opening event taking place in May 2025. Our teams worked hard to make sure skatepark and play park were open in time for residents to enjoy during February half term. We also finalised the Nature Zone by planting some wildflowers, bulbs and large trees that will provide much needed shade during the summer months.





## Protect & Enhance the District's Natural Environment and Green Spaces



**Environmental Protection Activities:** Enforcement action has continued with the new Public Space Protection Order (PSPO) on Eakring Road. Nottinghamshire Police's Off Road Biking team are patrolling on a regular basis, resulting in one motor bike being seized, and the riders details were shared with us in order to issue an Fixed Penalty Notice for breach of the PSPO. As part of our ongoing commitment to secure this site, we have met with a representative from the Green Lane 4x4 group to get some advice on securing the area. We also conducted a site visit with Harworth Estates who have agreed to re-secure the entrance to the land known as 'The Desert' to prevent unauthorised access.

As part of the ongoing **delivery of the Council's Tree Strategy**, this quarter we have planted 1156 trees and hedgerow plants at several sites around the district. This includes Sherwood Avenue Park, where a number of specimen trees were planted including some fan trained fruit varieties and Clay Lane, where a small woodland has been planted and new signage installed marking the site as a wildlife area.

Also this quarter, we have given away 1450 trees and hedgerow plants. As part of our annual free tree giveaway, we distributed 950 trees to residents. This year the choice was between Beech and Wayfaring Trees, both chosen because they are species which can be grown either individually or as part of a hedgerow. We've also supported Lowdham Parish Council with the replanting of an historic Hedgerow around the Parish Churchyard, supplying 500 Blackthorn and Hawthorne whips. In February we obtained Cabinet approval to support Nottinghamshire County Council with the creation of 2 new woodland sites near Little Carlton and Southwell. These sites will result in 114,000 trees being planted in the district and our contribution is being funded by underspends in climate change related capital schemes. As part of our funding agreement, we will be entitled to 30% of the carbon credits from the scheme which will provide carbon offsets of around 845 tCO<sub>2</sub>e annually once the trees are matured.



This quarter we completed **an audit of all litter and dog waste bins, which have enabled us to map the locations and assess their suitability.** We are now in the process of beginning to look at the results of the survey and assessing which bins might need attention and ensuring they're all in the most suitable location.



# Protect & Enhance the District's Natural Environment and Green Spaces



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Number of fly tipping incidents	1,576	1,604	1,625	1,800
Number of events held in NSDC parks	270	326	451	150
Number of loads rejected at Veolia's disposal facilities	New For Q1 23/24	0	0	3
Kg of residual household waste collected per household	514.0kg	493.1kg	Awaiting External Data	N/A
Number of children reached via environmental education visits including river health and 'Motion for the Ocean'	New For Q1 24/25	New For Q1 24/25	3,210	900
Number of targeted focus weeks	New For Q1 23/24	5	7	7
<b>All Other Indicator Types</b>				
% fly tipping incidents removed within 72 hours	95.8%	93.6%	97.8%	80.0%
Number of level 1 graffiti incidents not removed within 36 hours	New For Q1 23/24	0	0	0
Number of level 2 graffiti incidents not removed within 10 days	New For Q1 23/24	0	0	N/A
% of failing sites - street and environmental cleanliness - litter	0.8%	0.6%	0.9%	2.7%
% of failing sites - street and environmental cleanliness - detritus	1.1%	1.0%	0.8%	1.7%
% of all programmed Environmental Permitting Regulations inspections completed	100.0%	100.0%	150.0%	N/A

Annual Indicators	22/23	23/24	24/25	Target 24/25
Number of trade waste customers retained	New For Q4 24/25	New For Q4 24/25	1,280	N/A

## Protect & Enhance the District's Natural Environment and Green Spaces



### Exploring our performance...

The % of all programmed Environmental Permitting Regulations inspections completed is performing at 150% this quarter, the reason for this is that there were 2 due in Quarter 4 and typically we programme less inspections in for Quarter 4 as this allows chance for us to catch up where required. We completed a total of 3 this quarter as one carried over from Quarter 3.





# Reduce the Impact of Climate Change



Climate change is an important and complex challenge, possessing significant risks to the environment, the economy, and the well-being of people and communities. Local authorities have a crucial role to play in mitigating and adapting to the effects of climate change, as we are responsible for delivering essential services and managing local resources. We are committed to reducing our carbon footprint and contributing to a greener and more sustainable future.

As part of our objective to champion good stewardship by the relevant authorities of the River Trent and its tributaries. To encourage addressing pollution and litter at source, contributing significantly to **the preservation and restoration of the ocean...**



**We hosted the Plastic's Got Talent Competition:** The aim of this was to help to highlight the amount of single-use plastic used daily, we created a competition inspired by a well-known family show for schools to participate in should they wish to. We asked classes to create instruments from plastic items to create their own tune. The music and some instruments are due to be featured as part

of Open Doors' 'Strings Day' on Saturday 3rd May. The classes who are awarded prizes will be able to choose a book for each pupil in their class. Alongside the competition, we provided resources on how plastics are both useful and dangerous to our environment which has been added as part of our resources for schools offer under the Greener Schools Programme.



**The Three Rivers Project** came to a conclusion at the end of March. Extensive refurbishment has been undertaken at Vicar Water Country Park with new hedgerows planted. There is a work programme ahead for pond dipping sessions aimed at school children with the rangers.

In Quarter 3 we shared updates on the **Market Place Improvement Project** – since then, we have continued to work with the Newark Town Board and Newark Town Council to agree a vision and established principal outcomes for the Market Place Improvement scheme. As a result we have developed concept design options for the space with a local Architect and are working with a Quantity Surveyor to cost the proposed plans for the public realm which will be agreed with the Board in Quarter 1.



**The programme of solar panel installation across Council buildings** has now seen Solar PV arrays installed on 7 of our corporate sites. Installations at the Dukeries Leisure centre, Newark Sports & Fitness, The Newark Beacon, Vicar Water Park, Sconce & Devon Park, Gladstone House and Broadleaves care home are expected to generate over 470.000 Kwh of electricity per year and save in the region of 100 tCO2e annually in addition to providing significant financial savings on our utility bills.

Work is ongoing to identify further interventions that will reduce the Council's carbon footprint and examples of these will be presented to Cabinet in June 2025 alongside a review of our current Climate Strategy action plan.



# Reduce the Impact of Climate Change



The end of March marks the end of the **Home Upgrade Grant 2 (HUG2) scheme**, delivered locally in partnership with Nottinghamshire County Council and charity, Nottingham Energy Partnership.

42 households within the district are currently engaged in the scheme, of which:

- 30 installations (mainly solar panels, insulation measures and air source heat pumps) are fully completed
- 12 are due to be completed by the end of March 2025.

Feedback from residents benefitting from the HUG2 scheme has been very positive, with satisfaction scores being submitted averaging 9 out of 10 over the entirety of the scheme.

**Replacing Oil Heating Systems with Air Source Heat Pumps and Solar Panels:** To improve affordability for tenants and reduce carbon emissions we secured funding to upgrade properties with oil heating systems. At the end of Quarter 4, we have completed 102 of our SHDF 2.1 grant funded properties as well as a further 8 properties, bringing the grand total to 110 properties which are now using air source heat pumps and solar panels.

In Quarter 3 we suggested we were due to hear back this quarter in relation to the bid that we submitted for the Warm Homes Social Housing Grant to upgrade a further 300 properties over a three-year period. We have now heard back with regards to wave 3 funding, and unfortunately the funding awarded is 50% lower than the bid we submitted due to over subscription. This means we will only be able to upgrade circa 150 properties over the next 3 years. We are currently in the process of procuring a contractor to begin these works, and we are hoping to start before the end of Quarter 2 25/26.

On an annual basis we report our progress towards implementing a **Local Area Energy Plan (LAEP)**. The LAEP is a 'where and when' masterplan, which identifies the most cost-effective pathway for the local area to reach net zero and realise local benefits. It is data driven and is a whole energy system, evidence-based approach that is led by local government and developed collaboratively with defined stakeholders. Work is well underway to establish the district's baseline, and officers are providing data and regularly contributing to workshop discussions with key stakeholders in the region. The outcome, which is expected later this year, will include 3D modelling of the district which will map all buildings showing their current energy usage/efficiency ratings. This will enable a more targeted approach to the Council's retrofit program for example and help to provide the best account of social value in addition to directing key funding streams toward areas of deprivation and those experiencing fuel poverty.

**Continue to deliver the Brunel Drive Masterplan:** A project team has now been established to guide this development. The tender documents are being prepared for the demolition and construction works at Brunel Drive/Farrar Close, this will provide the much needed space to accommodate additional waste collection vehicles in preparation for the commencement of food waste collections. We are also in the process of seeking planning permission to remove the temporary permission for the glass bulking facility at the lorry park

# Reduce the Impact of Climate Change



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Number of Council homes with retrofitted energy efficiency measures	New For Q1 24/25	New For Q1 24/25	135	N/A
Total gas and electricity energy consumption across Council owned corporate assets	New For Q1 24/25	New For Q1 24/25	1,024,895	N/A
Total energy generated from solar panels on Council owned corporate assets	New For Q1 24/25	New For Q1 24/25	85,198	N/A
Total businesses or community facilities supported with energy efficiency measures through successful UKSPF applications	New For Q1 24/25	New For Q1 24/25	7	N/A
<b>All Other Indicator Types</b>				
% of household waste sent for reuse, recycling and composting	35.4%	33.4%	Awaiting External Data	40.0%
Number of missed bins (per 100,000 households)	44.4	52.5	32.5	45.0
Total number of garden waste subscriptions	19,188	20,949	21,678	20,000
Number of missed assisted collections	New For Q1 23/24	254	205	N/A

Annual Indicators	22/23	23/24	24/25	Target 24/25
% of Council homes with an energy efficiency (SAP) rating of C or above	68.0%	52.3%	N/A	70.0%
Number of trees planted on Council land or partner land	New For Q4 23/24	867	1,156	600
Number of trees given away to residents	New For Q4 23/24	1,305	1,450	1,000
Total CO2 reduction across our estate and fleet in tonnes	New For Q4 24/25	New For Q4 24/25	Awaiting External Data – Update due in Q1	N/A

### Exploring our performance...

The number of Council homes with retrofitted energy efficiency measures equates to 135 properties that have benefited through SHDF and Devolution funding. There have been more than 270 different measures fitted including Air Source Heat pumps, solar PV and battery storage and EWI.

The garden waste subscription window closed at the end of Quarter 3, and we finished the year with 19,280 Customers paying for 21,678 bins which equates to 6,954.32 tonnes collected this year.

The indicator which measures the % of Council homes with an energy efficiency (SAP) rating of C or above is not reportable at present. The team are in the process of undertaking full stock condition surveys of all Council owned properties to eliminate inaccurate or cloned data from our system. Based on current information, 50% of our properties are currently at a C rating or above. We are currently formulating a planned programme of works to bring all Council properties up to a C rating. This is being developed using current EPC data and data from a programme of new EPC's.



# Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



## What we have been doing this quarter;

We aim to foster community spirit, pride of place, and connectivity through adaptable cultural activities, strategic marketing campaigns, and support for local projects. Key efforts include promoting family-friendly tours, completing heritage site developments, collaborating on community actions, offering grants, and supporting veterans. We also plan to revitalise town centres and ensure diverse participation in our major projects. Newark Town Board have reviewed their Board Structure and have since adopted an approach based on key sectors and identifying local partners to champion those sectors within the Board. This includes private, voluntary, education, community, youth and public sectors. Additionally, the new guidance on the Plan for Neighbourhood Programme will seek to consider a more inclusive Board, with expanded representation.



This quarter the delivery of the **Newark Castle Gatehouse scheme** has taken some significant steps forward as a main contractor has been selected following a successful tender process. The contractor is expected to commence work on the site between May and June 2025 and as such further updates can be expected in quarter 1. The interpretation plans for the new galleries are being designed and are progressing well. A team of volunteers are researching Medieval history of the Castle and of Newark. Partnerships have also been developed with St Mary Magdalene Church and Newark School of Musical Instrument Crafts to develop co-curated elements.

## As part of our ongoing work to **deliver season destination marketing campaigns and promote visitor attractions**, we launched the Town and City Gift Card this quarter. There are currently 81 retailers signed up to the initiative across the district and the map below shows the spread of retailers across the district and consists of 58 shopping businesses, 15 food and drink/hospitality venues, 6 businesses that provide leisure, attractions and services, as well as 2 health and beauty businesses. Available as either a physical gift card, or an e-card that can be added to digital wallets, the card will make it easy for recipients to 'shop local' with a range of local and independent shops, restaurants, salons and service businesses. We are hopeful that the gift card will encourage tourism within the district by showcasing a variety of local businesses, cafes and retailers and making them accessible through a single gift card.





## Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



One business accepting the new gift card will be Shirt Sleeves, based in Newark. Shop owner Henry Tacey explains: *"We think the Gift Card is a fantastic initiative to help increase footfall in the local shops, cafés and restaurants of the area. Shoppers will have a fantastic range of local businesses to use their Gift Cards with & we're very excited to see the impact the Gift Card has. A big thank you to everyone involved and Newark and Sherwood District Council for their continued support of local business."*

SHIRT SLEEVES

The end of this quarter sees the successful completion of the 2024/25 **programme of activities funded by the National Portfolio Organisation**. This includes our fourth Artist in Residence developing a digital game based on Newark's waterways and heritage, a programme of Artists in Schools supporting students and teachers to develop creative skills and the culmination of the Our Heritage Project – Mining for Stories.



The success of Mining for Stories, in which we collaborated with Bilsthorpe Heritage Museum and members of the former mining community to co-create a touring exhibition, has been a catalyst to continue the partnership with Bilsthorpe Heritage Museum. A new project is in development to explore the mining community's connection to music through colliery bands.

In order to continue our work towards achieving our objective to **develop a flexible, creative approach to cultural visiting, with family orientated activities**. To include family tours, drop-in arts activities and storytelling that utilise the three heritage sites with a vision of integrating our offer to broaden our reach and appeal to a wide range of audiences. We have undertaken a broad programme of activities this quarter:

- We welcomed 954 students across a range of age groups and abilities from schools in Newark and Sherwood and across the country between January - March. The evaluation forms received from the schools who visited the National Civil War Centre consistently rate our learning days as 'Excellent'. Teachers at Queen Elizabeth Grammar School commented that the activities offered were "Interactive, engaging, informative and really well thought out, allowing pupils to get involved with lots of variety, and really develop their learning. Really engaging as always – thanks to all the staff!" Coddington Primary School staff commented that "the pupils benefitted from developing increased knowledge of the civil war, led by an expert in the field. Great sessions, education team leading the sessions were great".



## Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



- Last quarter we shared that we are proud to have been awarded the prestigious 'Kids in Museums Family Friendly Museum of the Year Award', which has since led to several invitations to speak at national conferences, sharing our family friendly best practice with museums and galleries across the country. Several members of staff from these museums have contacted us separately to arrange for follow up bespoke conversations to explore in more detail our family friendly best practice.

- We have delivered three more successful Family Saturday events this quarter, which were well attended and saw 460 visitors taking part. The events hosted this quarter consisted of craft activities, family tours and activities like musket drills. We moved the date of one of these to coincide with International Women's Day and welcomed a



*The lucky winner of the game, Vlad, who chose a shark tracking plushie made from recycled water bottles. Congratulations, Vlad!*

reenactor on horseback and a focus on female spies during the British Civil Wars. The events have also had a focus on environmental education which was delivered by our Environment officer in the form of a game around plastic pollution and tips on how to reduce water pollution at home. Children could take part in fishing out plastic bottles in 'Pluck out that Plastic' to win a prize and write a pledge on the 'Ocean Pollution' wall. Around 30 children took part in the activities. The feedback from visitors indicates this has been well received and enjoyed by visitors.



- To support the Newark Creates Mr Kronovator event in the market square, we hosted an event in our Tudor Hall which offered a 'Create Late' activity. Visitors had the opportunity to create firebirds and fire-breathing dragons from recycled and scrap materials. This event was even better attended than the Historical Escapades event last October, with 400 visitors attending. Visitors spent on average an hour enjoying the craft activity and a quiet and restful play space which many commented on appreciatively.



- Our work on the 'Working Together for Health and Wellbeing' project has continued. We are working with an experienced artist, Kristina McCormick, who specialises in art and wellbeing activity across the district. She has been working with a group of women who have reported improvements to their sense of wellbeing and mental health as a result of being involved. We have been able to plan for an extension to the project which will transfer to The Holt at Sconce and Devon Park for the summer sessions.



## Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



- 4 historic themed talks were hosted in our Tudor Hall this quarter, which were attended by 170 people. Topics included the Trial and Execution of Charles I, Dance in Stuart England and women in the seventeenth century.



**The Newark Cultural Heart programme** plan consisted of one large-scale event this quarter, the Fire, Flame and Frenzy event. The event took place during an evening in Newark Market Place and it was a new event of its kind in Newark, and a first for the town centre.

Positive resident, business and visitor satisfaction was received about the event and resulted in an increase in footfall with 2,906 people recorded in Newark during the hours of the event. The event ran from approximately 5pm – 9pm, and footfall was 32% higher than usual during these times. Additionally, 58.9% of recorded visitors to the Market Place during this time were new to the town which equates to around 670 brand new visitors not including those visitors who may not have a mobile phone, or those who may have been out of range of the sensors.

Respond to community requests to support any **community-led days of action across the district**, in conjunction with partners. This quarter ASDA Newark invited us to join them in the store foyer for Global Recycling day which took place on Tuesday 18th March. We shared information with shoppers to promote recycling in the district, including giving away bin stickers and leaflets, as well as promoting the LitterLotto® mobile app. The app will help everyone to recycle right, keep neighbourhoods clean, and reward residents for binning waste.



As part of our ongoing to **support the veteran community around the district**, we have delivered a number of initiatives this quarter:

- Newark Services Club have been awarded several grants which will help towards the upgrade to their kitchen facilities

## Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



- We are providing support to Bilsthorpe Veterans Breakfast club monthly, by volunteering to help run their veterans breakfast club once a month. This enables our teams to continue to build connections in the community whilst doing so
- We supported the Rainworth Veterans Breakfast club with posters, we also attended the Rainworth Royal British Legion meeting to discuss events in the Armed Forces Calendar for the year ahead
- We hosted an Armed Forces networking event in February, bringing together 40 representatives from Parish and Town Councils. The purpose of this event was to understand what is taking place across the district and enable the creation of a calendar of events which has been published on our website

We made a referral to Defence Medical Welfare Service for one of our tenants, as well as arranged for the veteran to access free counselling via the Newark Patriotic Society

**Support the delivery of community initiatives through ongoing grant schemes:** Round 2 of the Community grant scheme took place in January 2025. £71,193 was awarded to the following groups:

Organisation	Payment awarded	Area	Additional Notes
Sherwood Forest Trust Festival 2025	£5,000	Sherwood	Full award
The Minster School Parent Teacher Association	£4,995	Sherwood	Full award
Grow Incredibles CIC	£4,590	Newark	Full award
Southwell Women's Institute	£7,950	Sherwood	Full award
Edwinstowe in Bloom	£5,000	Sherwood	Full award
Muskham Cougars FC	£1,870	Sherwood	Full award
Elston Allotments	£5,284	Newark	Full award
Newark Sea Cadets	£4,612	Newark	Full award
Rainworth & Blidworth Amateur Boxing Club	£4,995	Sherwood	Full award
Newark Town Football club	£5,000	Newark	Full award
Collingham Rural Advice Centre	£7,500	Newark	Partial award
Newark Amateur Boxing Club	£4,000	Newark	Partial award
Newark CVS	£3,009	Newark/Sherwood	Partial award
Oxton Village Hall	£4,877	Sherwood	Partial award
Winthorpe Community Centre	£2,508	Newark	Partial award

All successful applications met one of the schemes 'priority areas' for funding including

- 3 demonstrating match funding
- 1 that met the climate change agenda
- 6 that support a reduction in anti-social behaviour
- 5 that will support residents managing the cost-of-living crisis

When considering the spread of awards across the district, 7 awards are recommended for Newark based group/ activities, 7 for Sherwood based groups/ activity and 1 that covers both areas

This quarter, the Efficiency East Midlands (EEM) small grant scheme awarded 18 community groups funding to the value of £7,101 as detailed below:



## Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



Group Name	Payment Awarded	Description
DD's Soup Kitchen	£356	Food voucher and equipment
Newark preloved children's uniform club	£385	Clothing
Stroke to strength	£371	Zoom license and marketing items
Pensioners Sunday lunch club	£500	food voucher and equipment
Gorillaman Fitness	£500	New equipment
Newark Conservative Club	£500	New bowling equipment
Newark Breast Cancer support	£500	Rent for room hire
Men that Matter	£421	New marketing/promotional material
Rumbles Catering Project	£500	New cooker
Wigsley, Harby & Thorney Going Green Group	£500	Litter picking equipment
Delacy Bingo group	£357	New equipment
Knights court Sewing group	£92	Refreshment supplies
Accordion/ Music Group	£79	Refreshment supplies
Well Green House Bingo and Chair exercise groups	£405	New equipment
Millgate community Centre	£491	Printer and paper
Ollerton and Boughton Roundabout Community Newspaper	£453	New marketing/promotional material
Still Smiling	£250	Zoom licence
St George's Day Celebration Group	£435	Money towards St George's day event

In January 2025, we successfully finalised a Memorandum of Understanding (MoU) with Government relating to the Levelling Up Fund Round 3 (LUF 3) Sherwood scheme, which formalised the **commitment to provide £20m across both Ollerton and Clipstone regeneration projects.**

We received formal confirmation from Government in relation to the extension of LUF 3 funding from March 2026, to March 2028, this is following ongoing delays with the release of funding. Following receipt of the MoU, we were recently granted an initial sum of LUF 3 funds to finance eligible investment to date against both schemes.

Both the Ollerton and Clipstone schemes continue to progress towards planning submission and Business Case approval, funding was agreed by Cabinet to facilitate further works throughout the Royal Institute of British Architects (RIBA) stage 3. Planning for the Commercial Units as part of Clipstone Phase 1, was secured in March 2025 and work is scheduled to begin towards the end of Spring to develop 30 brand new units on the site. Tenant and stakeholder negotiations are ongoing for the Ollerton scheme and Clipstone Phase 2/3, as well as continued legal works to finalise land related matters for both schemes. Key risks to delivery and timescales, continue to compromise land acquisition, outstanding match funding and planning submission.

**Develop opportunities to maximise the visitor offer linked to Sherwood Forest:** The draft Sustainable Economic Growth Strategy encapsulates the objectives of the Destination Management Plan and the focus of an action plan, to promote key unique selling points of the District such as Sherwood Forest. The campaigns developed in 2025/26 will include and promote the visitor offer at Sherwood Forest.

# Celebrate & Invigorate Community Spirit, Pride of Place and Sense of Belonging



## Measuring Success

Quarterly Indicators	Quarter 4 22/23	Quarter 4 23/24	Quarter 4 24/25	Target 24/25
Year to Date Indicators				
Total footfall across all heritage and culture services and sites	New For Q1 23/24	99,651	123,630	100,000
Total number of admissions - National Civil War Centre	13,234	16,800	16,844	14,000
Total number of admissions - Palace Theatre	59,877	52,619	66,122	50,000
Number of people reached through direct participation and outreach	New For Q1 23/24	12,060	14,385	12,000

Annual Indicators	22/23	23/24	24/25	Target 24/25
Year to Date Indicators				
Increase in dwell time in Newark Town Centre	New For Q4 23/24	10.3%	23.4%	2.0%
% of visitors from schools – Palace Theatre	New For Q1 23/24	12.0%	11.0%	N/A
% of visitors from schools – National Civil War Centre	New For Q1 23/24	24.0%	22.0%	N/A

### Exploring our performance...

Total footfall across all heritage and culture services and sites has exceeded our expectations this year, including the theatre, museum, outreach and in the café.

The number of people reached through direct participation and outreach, via the Open Doors Programme which is funded through the Arts Council England's National Portfolio Organisation funding continues to deliver positive results in outreach activity.

# Be a Top Performing, Modern and Accessible Council



Striving to be a top-performing, modern, and accessible council is crucial for meeting the evolving needs of our community. The initiatives outlined below are essential for enhancing our operational efficiency, ensuring regulatory compliance, promoting staff well-being, and driving continuous service improvements. By focusing on these areas, we aim to build a resilient and responsive organisation that serves the public with integrity and excellence.

**Commercialisation Strategy & Action Plan:** 5 meetings were held during the quarter attended by Section 151 Officer, the Financial Services Business Manager and project owners to discuss progress against individual projects. An update against the major projects was included within the Medium Term Financial Plan, which was approved by Council on 6th March 2025.

Where projects are developed enough to be budgeted for, budgets have been adjusted and hence put into the Revenue budget for 2025/26. Where projects still need further development, updates were given to Members, but budgets have not been adjusted for within the 2025/26 budget, nor the preceding years in the Medium Term Financial Plan.



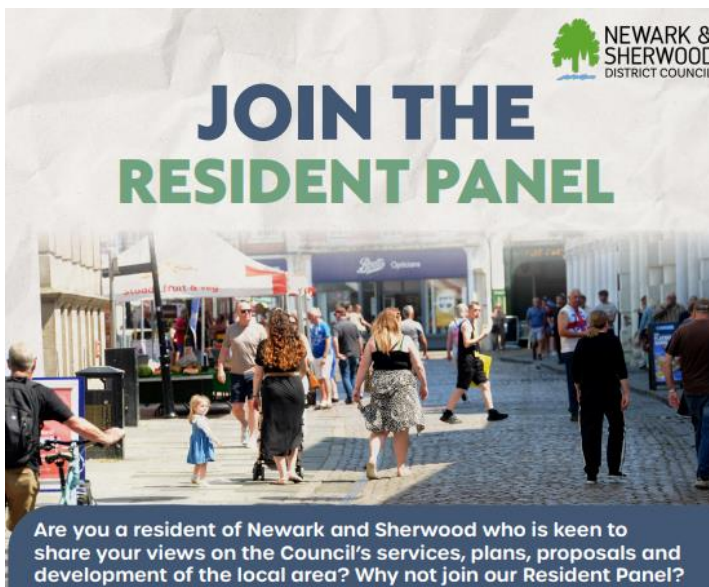
2. Commercial Strategy 2022 - 2026 – How our Commercial Strategy operates within the context of the Community Plan

**Customer Experience Strategy:** The survey and implementation plan for complaint satisfaction feedback has been completed this quarter. This has enabled the commencement of the satisfaction surveys. The results will be shared with the Senior Leadership Team once complete and will be included in the December – March 2025 complaints report.



**Regulatory Inspections and Requirements:** Evidence has been gathered and updated in relation to the assessment criteria set by the regulator of social housing, a gap analysis has been carried out and our position identified. We have some actions in place to address areas for improvement, the latest updated position and details of the gaps will continue to be reported each quarter to the Tenant Engagement Board until we are inspected. We are also working on reviewing key policies to ensure they are both current and meet style and branding requirements. A new Housing Performance and Improvement Board has been set up, chaired by the CEO to prioritise areas for improvement within Housing Services, to ensure the appropriate focus, resources and oversight are in place to reach and maintain excellent service levels.

The process to **reinvigorate the Resident Panel** is now complete, the aim was to revitalise the panel to improve engagement, as well as understand how representative the panel is of the districts demographic



profile. There were 701 residents on the panel before the refresh however they were largely inactive and nothing more was known about these residents aside from their name, email address and that they were over the age of 18. As part of the refresh, it was important to gather more information to understand how representative the panel is and to provide the opportunity for targeted consultation. Therefore, the refreshed Resident Panel sign up process now collects the following information: *Name, Email address, Postcode (to inform ward data), Age range, Youth engagement (16 years and older to sign up), Parental status (sharing views on behalf of their children), Gender, Ethnic group, Residential status and Areas of interest.*

Alongside the ability to provide areas of interest, residents are incentivised to join the Resident Panel through 6 monthly prize draws where they have the opportunity to win a £50 gift voucher to spend at a variety of retailers.

To refresh the panel, we sent emails to all existing members asking them to provide the additional information if they wished to remain on the panel. We now have 255 active residents signed up to the panel, including residents signing up after the 6 monthly prize draws. Despite the decrease in overall members, it is evident that our Resident Panel is responsive and engaged. A recent survey sent to the Resident Panel received 191 responses, this is a response rate of 75%. Work is ongoing to grow the panel and to maintain engagement of existing members, this includes early discussions around a face-to-face focus session where they can ask questions and learn more about the Council's commitment to the district and its residents.

**Expand the range and quality of services available online:** The procurement of a new telephony system is progressing and the contact centre solution is due to go live in Summer 2025. There will be phased rollout of the contact centre solution, with webchat being part of phase two. It is anticipated that the webchat functionality will be operational by Autumn 2025.



# Be a Top Performing, Modern and Accessible Council



**We have been working to expand and refresh the wellbeing and engagement programme,** with work being completed this quarter to implement an enhanced counselling service and full Employee Assistance Scheme which includes a wellbeing portal for staff and their family members to utilise, additionally the existing health cash plan service which was on trial for a year has been procured for a further 12 months.

**Develop a package of measures to recruit and retain staff, including a review of the pay grading structure and the Council's job evaluation scheme.** The Reward & Retention project has advanced at a good pace over the last quarter, the staff benefits workstream is now complete, the review of Job Descriptions is 75% complete and evaluations are due to commence in April 2025.

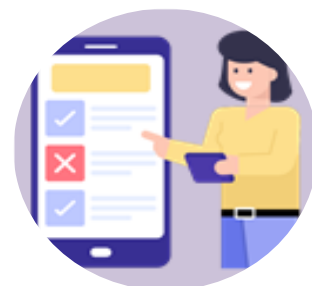


## REWARD AND RETENTION PROJECT

We carry out an **all Staff Survey once every 18 months**, the most recent survey which was carried out in July-August 2024 received the highest number of responses recently experienced and the results show of the 357 colleagues who completed the survey, 90% gave a positive response when asked whether the Council were a good employer. In addition, 91% of respondents agreed that they understood where their role fit in terms of the community plan objectives and an overall 'job satisfaction' rating of 79% was received in the main survey questions.

Job satisfaction was also the most represented category in the free text final comments box where 61/93 comments were around satisfaction and all 61 were of a positive nature. That said, the results also show us that some colleagues are feeling under pressure due to their workload with only 58% agreeing that it is currently manageable. This was also reflected in the comments received from respondents where 90% of the 77 comments received on this being negative. (the remaining 10% were coded neutral).

In terms of other key comments, 66% of 96 comments received on the subject of satisfaction were positive. (this included general satisfaction, satisfaction with team). However, within that 64% of the 22 comments received around recognition were negative. It is evident that some colleagues are finding it tougher than the majority and the themes of workload and recognition feature as the most prominent reasons for this.



What is clearly evident however is that a significant majority feel valued, supported and proud to work for the Council.

# Be a Top Performing, Modern and Accessible Council



## Measuring Success

Quarterly Indicators	Quarter X 22/23	Quarter X 23/24	Quarter X 24/25	Target 24/25
<b>Year to Date Indicators</b>				
Engagement rate with posts issued on NSDC Facebook and X combined	920,610	1,085,448	930,172	1,000,000
Contact Centre - telephony - average length of time to answer call (seconds)	84.0	156.0	91.0	120.0
No of digital web form transactions	31,236	62,200	65,940	36,000
% business rate collection	97.2%	97.8%	98.2%	98.2%
% council tax collection	97.1%	97.2%	97.2%	97.4%
No of phone calls presented to Contact Centre	118,282	113,532	109,742	Demand
No of face to face contacts (Castle House)	13,299	16,720	17,271	Demand
Satisfaction with lettings service	94.0%	92.0%	93.0%	95.0%
Satisfaction with careline services	New For Q1 24/25	New For Q1 24/25	100.0%	90.0%
Satisfaction with temporary accommodation	New For Q1 24/25	New For Q1 24/25	96.1%	90.0%
<b>All Other Indicator Types</b>				
% effective response to careline calls within 60 seconds (industry standard)	New For Q1 24/25	New For Q1 24/25	99.1%	97.5%
% invoices paid within 30 days - whole Council	98.0%	98.0%	94.7%	98.5%



## Exploring our performance...

The **engagement rate** with posts issued on NSDC Facebook and X combined is below target. This is because X is not performing as it was since its move from Twitter. We are undertaking a social media audit to inform the future of using X as a social media channel. As part of the audit, we are currently researching new platform BlueSky to use alongside X to increase overall engagement rates. We will also increase the use of video content which we know improves engagement. By Q2 in 2025/26 we will have completed the audit which will help inform our future plans.

The number of **digital web form** transactions is performing well. The number of digital web transactions forms and exceeds the 62,200 completed during 2023/24 which included the opt in or out of the kerbside glass recycling scheme. We are constantly looking to improve and increase the number of online forms we have and to encourage the take up of them.

The number of **calls received in the contact centre** during 2024/25 was 3790 lower than 2023/24 which equates to 73 less calls a week and it is difficult to say exactly why. The calls we receive often relate to what is happening "in the moment". We have seen a reduction in enquires relating to government grants, we haven't experienced extreme weather or flooding incidents and there haven't been major changes to the services the Council provides. We hope that residents obtain the information they require from our website and or utilise our online services.





# Our Workforce



A positive and motivated workforce is more likely to be high performing. To understand how our staff are performing and how we are supporting them we look at key indicators and recent activity.

## Colleague Health and Wellbeing

This quarter a range of activities have taken place, centred around supporting the health and wellbeing of our workforce. Our Wellbeing Hub is also available to colleagues 24/7 and contains a wealth of information and support to help colleagues access the support they need and promote overall wellness.

Two events dedicated to enhancing **Musculo-skeletal health** were held throughout March. We understand the impact Musculo-skeletal health can have upon our workforce, especially for those colleagues who are predominantly desk based. Due to this, these sessions consisted of chair-based exercise sessions, valuable information on workplace assessments, policies and available adaptations.



Colleagues had the opportunity to learn the **Salsa and Bachata** during February. Our very own dancing king Claudiu started weekly evening sessions that provided the perfect opportunity for colleagues to get active and learn new skills.

## Colleague Engagement

The **Staff Roadshows** took place in February; 340 colleagues joined us over three sessions held at the Palace Theatre. The Roadshows are an opportunity for our Senior Leadership Team to share outside some key messages around areas of work planned this year with colleagues and provide the chance for colleagues to ask some questions of the Senior Leadership Team.



## Career Development

We celebrated **National Apprenticeship Week 2025** this quarter with a series of social media posts shining a spotlight on the apprentices within our organisation and their experiences of their apprenticeship programme.

### #NAW2025



With my apprenticeship I will hopefully achieve my APM Project Management Qualification with the Heart of England Training Provider. This apprenticeship covers many different topics including governance arrangements, risk and issue management and stakeholder engagement and communication.

With my role specifically, I really enjoy the range of projects I work on, allowing me to work with colleagues from different business units and gain an insight of the varied work that takes place. In general, I'm extremely grateful for the continued professional and personal growth in the organisation. This wouldn't be possible without the opportunities I've been given and the continued support from my team and wider colleagues.



**Philene Evason-Bacon**  
Associate Project Manager  
Apprentice

SERVING PEOPLE, IMPROVING LIVES

### #NAW2025



My apprenticeship covers a broad spectrum of planning including policy, urban design, geography, environment and infrastructure and planning for climate change. I only have one year left and then I can work as a qualified planner.

I enjoy my job, every day is a school day but the team are great and everyone helps everyone and makes suggestions.



**Jamie Pegram**  
Urban Planning  
Apprentice

SERVING PEOPLE, IMPROVING LIVES

# Our Workforce



## Measuring Success

Quarterly Indicators	Quarter X 22/23	Quarter X 23/24	Quarter X 24/25	Target 24/25
Year to Date Indicators				
Average number of sick days per employee (FTE) per year lost through sickness absence	7.4	6.8	7.0	6.5
% of staff turnover	New For Q1 23/24	14.0%	13.0%	13.0%



## Newark & Sherwood District Council Compliance Report

### 2024-25 Quarter 4

#### Introduction

Compliance refers to the alignment of a built asset with the relevant rules, regulations, and codes. This includes the products and materials incorporated into the building, as well as the way in which they are assembled and constructed. It is important that we continuously review our compliance to identify and rectify any issues identified to keep the buildings users and occupiers safe. This report provides assurance that the Council is compliant in its three key areas of corporate compliance, housing (tenant) compliance and green space compliance.

#### Corporate Compliance

Corporate compliance refers to the compliance of the 25 commercial sites owned by the Council. We provide assurance on all Council-owned buildings, whether directly operated or leased to third parties (such as the Gilstrap) as the maintenance of the built asset remains the responsibility of the owner.

Blidworth Leisure Centre	Newark Beacon Innovation Centre
Bridge Community Centre	Newark Castle
Buttermarket Shopping Centre	Newark Lorry Park & The Ranch Café
Castle House	Newark Palace Theatre
Church Farm Business Centre	Newark Sports And Fitness Centre
Brunel Drive Depot - 4 Buildings (A, B, C, D)	Ollerton Housing Office
Dukeries Leisure Centre	Queens Sconce Visitor Centre
Farrar Close	Sherwood Forest Arts & Crafts Centre
Gilstrap Centre Public Toilet	Southwell Leisure Centre
Hawtonville Community Centre	The Tom Mann Pavilion
National Civil War Centre	Vicar Water Visitor Centre

We provide assurance that the asset is compliant in 6 key areas.

- Legionella
- Asbestos
- Fire
- Gas
- Electrics
- Lift inspections

#### Performance Indicators for Corporate Compliance for Q4 2024/25

Indicator	Previous Quarter	Current Quarter	Target
% Completed Legionella tests (due this quarter)	100%	100%	100%
% Completed Legionella Risk Assessments (due this quarter)	100%	100%	100%
% Completed Asbestos Condition Surveys (annual)	100%	100%	100%
% Completed Asbestos Annual Reviews (due this quarter)	100%	100%	100%
% Completed Fire Risk Assessments (due this quarter)	100%	100%	100%
% Completed Gas Boiler Services (due this quarter)	100%	100%	100%

% Completed Electrical Inspection Reports (due this quarter)	100%	100%	100%
% Completed Lift Inspections (due this quarter)	100%	100%	100%

### Exploring Our performance

All compliance indicators for commercial buildings have consistently achieved a 100% return over the past year

### Performance Housing Compliance

Corporate compliance refers to the compliance of our built assets owned by the HRA aka our social tenancy estate. There are 5,749 Residential/Domestic sites and we provide assurance that they are compliant in 6 key areas. As with our corporate estate, most of these sites are tenanted but the maintenance of the built asset remains the responsibility of the Council.

We provide assurance that the residential/domestic site is compliant in 6 areas.

- Legionella
- Asbestos
- Fire
- Gas
- Electrics
- Lifts

### Performance Indicators for Housing Compliance for 2024/25 Quarter 4

Indicator	Previous Quarter	Current Quarter	Target
% Completed Legionella tests (due this quarter)	58%	100%	100%
% Completed Legionella Risk Assessments (due this quarter)	65%	79%	100%
% Completed Asbestos Condition Surveys (annual)	100%	100%	100%
% Completed Asbestos Annual Reviews (due this quarter)	100%	100%	100%
% Completed Fire Risk Assessments (due this quarter)	No data rec'd	100%	100%
Number of outstanding RED Fire Risk Assessment actions	8	318	Trend
Number of outstanding AMBER Fire Risk Assessment actions	99	115	Trend
% Completed Gas Boiler Services (due this quarter)	98.35%	99.4%	100%
% Completed Electrical Inspection Reports (due this quarter)	99.5%	99.6%	100%
% Completed Lift Inspections (due this quarter)	100%	100%	100%

## Exploring Our performance

- Legionella testing achieved full compliance this quarter, rising from 58% to 100%, while risk assessments improved from 65% to 79%, though still below target.
- Gas boiler servicing remains slightly below the 100% target, currently at 99.4%. Access to properties continues to be the primary challenge. Legal proceedings are underway to gain entry where necessary, and weekly meetings with contractors are ongoing to monitor progress and drive further improvements in service delivery.
- Electrical inspection reports remain just below the 100% target at 99.6%; although the contractor had previously fallen behind schedule, performance has improved, with efforts underway to get six months ahead of the programme and achieve full compliance
- A sharp increase in outstanding RED Fire Risk Assessment actions, rising from 8 to 318, requires urgent attention.

## Green Space Compliance

Green space compliance refers to the compliance of our green spaces and play parks. The Council and the HRA own several parks and play areas, and we have a responsibility to ensure the safety of park users. Therefore, we inspect green spaces/parks and play parks to ensure they are safe to use.

Indicator	Previous Quarter	Current Quarter	Target
% Completed Play Park Inspections HRA Land (due this quarter)	100%	100%	100%
% Completed Play Park Inspections GF Land (due this quarter)	100%	100%	100%

## Risk

Alongside ensuring compliance we also monitor risk. This means we proactively identify potentially significant risks and implementing suitable control strategies helps prevent these risks from being realised, or this is not possible, mitigate to a tolerable level. This is done in two ways.

1. **Operational Risks.** These are developed and managed by Business Managers and capture localised risks. These risks are reviewed every quarter and exceptions are reported to SLT and the Risk Management Group on a quarterly basis.
2. **Strategic Risks.** These are developed and managed by Directors and are significant risks faced by the Council which have the potential to prevent it from achieving its key/agreed objectives and/or have the potential to halt or significantly interfere with the ability of the Council to achieve its core objectives, priorities and/or ambitions. These risks are also reviewed every quarter and exceptions are reported to SLT and the Risk Management Group on a quarterly basis as well as Audit and Governance Committee on a bi-annual basis.





Report to: Policy & Performance Improvement Committee – 30 June 2025

Director Lead: Deborah Johnson, Director - Customer Services & Organisational Development

Lead Officer: Carl Burns, Transformation & Service Improvement Manager  
Rowan Bosworth-Brown, Senior Transformation & Service Improvement Officer  
Tracey Allen, Research & Development Officer.

Report Summary	
Report Title	Customer Feedback – Half Year 2 - 2024/2025
Purpose of Report	The customer feedback report is an opportunity for the Committee to see what complaints are being submitted across the organisation. It gives an opportunity to understand how the customer is receiving the services we deliver and is a form of performance management to inform how well we are doing and where we can improve.
Recommendations	That the Policy & Performance Improvement Committee note the Customer Feedback Half 2 report.

## 1.0 Background

- 1.1. The Council values resident feedback on services received and has a robust customer feedback policy to capture, investigate, respond and learn from the insights it gives. This policy involves a two-stage complaint process, with the opportunity for complainants to escalate to the relevant Ombudsman if unsatisfied after Stage 2.
- 1.2. Feedback, both positive and negative, is crucial for identifying areas needing improvement and preventing larger issues. Significant work has been done in the past year on complaints policy, procedure and staff training. Key developments include comprehensive training for complaint handlers, a complaints toolkit, complaint response templates and adjustments to accommodate new Housing Ombudsman response times.

## 2.0 Half Year Report 24/25

- 2.1. The Customer Feedback report (Appendix 1) provides an overview of all types of customer feedback received between October – March 24/25. This half we received 20 suggestions and 75 compliments or praise for our services. In terms of complaints received, 305 complaints were logged at stage 1 with 42 being escalated to stage 2

Stage 1 Complaints	Stage 2 Complaints	Suggestions	Compliments (Praise)
305	42	20	75

2.2. Whilst the overall volume of complaints received is high when compared to the same half of 23/24, it should be noted that there has been a decrease in the total number of complaints when compared to half 1 24/25. This is also the first time we have seen a decline in the number of complaints received since the upward trend began in half 1 of 23/24. This is a positive sign and suggests the early impact of recent improvements is beginning to take effect.

2.3. We have proactively promoted ways in which residents can make complaints to raise awareness. There are some known issues in delivering the repairs service, which are being addressed. It is important to see complaints in context of almost 3,500,000 waste collections there were 56 complaints. There are 5,400 council homes and 231 complaints in relation to these.

2.4. The complaints responded to on time has declined and this can be attributed to a higher volume of complaints being received, resource challenges, and previously there were some difficulties with the complaint's software, which have now been resolved. The post of Complaints Coordinator has since been appointed within the Housing, Health & Wellbeing Directorate and will be responsible for managing complaints received at stage 1. In addition to this, a new process to improve response times Council wide, is being introduced and will be led by the Director of Customer Services and Organisational Development.

Period	Met Deadline	Missed Deadline	Total completed	% on Target
October - March 2023/24	194	22	216	90%
October - March 2024/25	139	157	296	47%

### 3. Distribution

3.1. This report is shared with SLT and then Business Managers before being presented to the Committees below. This enables Directors and Business Managers to consider if there are any themes and actions they need to undertake to improve the services they provide.

- Member Champion for Complaints
- Policy & Performance Improvement Committee
- Audit & Governance Committee
- Housing Assurance Board



#### **4. Proposal/Options Considered**

- 4.1. That the Policy & Performance Improvement Committee review the Customer Feedback Half 2 report.

#### **5.0 Implications**

In writing this report and in putting forward recommendations, officers have considered the following implications: Data Protection; Digital & Cyber Security; Equality & Diversity; Financial; Human Resources; Human Rights; Legal; Safeguarding & Sustainability and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

##### **5.1 Financial Implications**

There are no financial implications as a result of this report.

##### **5.2 Legal Implications**

There are no legal implications as a result of this report.

##### **5.3 Human Resources Implications**

There are no HR implications as a result of this report.

#### **Background Papers and Published Documents**

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

None

# 2nd Half Year Report Oct – Mar 2024/25



NEWARK &  
SHERWOOD  
DISTRICT COUNCIL

## CUSTOMER FEEDBACK

(COMPLAINTS, SUGGESTIONS  
AND PRAISE)

### Director Lead:

**Deborah Johnson**, Director of  
Customer Services and  
Organisational Development

### Lead Officers:

**Carl Burns**, Transformation and Service  
Improvement Manager

**Rowan Bosworth-Brown**, Senior Transformation  
& Service Improvement Officer

**Tracey Allen**, Research & Development Officer

[performance.team@newark-sherwooddc.gov.uk](mailto:performance.team@newark-sherwooddc.gov.uk)

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## CUSTOMER FEEDBACK ANALYSIS

Our Customer Feedback Policy has been formally adopted and agreed and is designed to cover the requirement of both the Local Government & Social Care Ombudsman and the Housing Ombudsman. We are bound by the requirements both Ombudsmen set out which are clear about the expectations on us in how we deal with complaints.

One of the key things that both Ombudsmen expect that we report on and use all the feedback from customers, especially complaints, to improve our services.

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This report is shared with:

- Senior Leadership Team and Business Managers
- Member Champion for complaints
- Housing Assurance Board / Tenant Engagement Board
- Policy and Performance Improvement Committee
- Audit and Governance Committee

### Contents

1. Context
2. Overview of Feedback
3. Complaints – Stage 1
  - 3.1 No of Stage 1 complaints received.
  - 3.2 Complaints by Business Unit
  - 3.3 Complaints by category
  - 3.4 Processing times
  - 3.5 Outcomes of complaints by delivery teams
  - 3.6 What we learned – examples.
4. Complaints – Stage 2
5. Ombudsman complaints
6. Suggestions
7. Compliments (Praise)
8. Putting it Right

## 1. Context

The Council recognises the importance of listening to the views of its residents about the services they receive from us. Our Customer Complaints and Feedback Policy provides the opportunity to capture, investigate, respond, and learn from customer feedback to assist with the delivery and shaping of Council services in the future.

Both positive and negative feedback is important to us as it provides us with a customer opinion, an opportunity for us to learn and with information to recognise what we are doing well and where we can improve our services.

It can act as an early warning of problems that may otherwise stay unseen until they become a larger problem, which can then take up significant resource and time to remedy. Feedback helps us find the root cause of problems and to recognise where specific systems or processes aren't working as they should, and it enables us to create meaningful and effective changes in policies, procedures and the training of staff.

Staff who respond to complaints undertake comprehensive training which includes how to investigate and respond to complaints, our process and the role of the Ombudsmen. We have updated our feedback handling system to support the process and ensure consistency of responses.

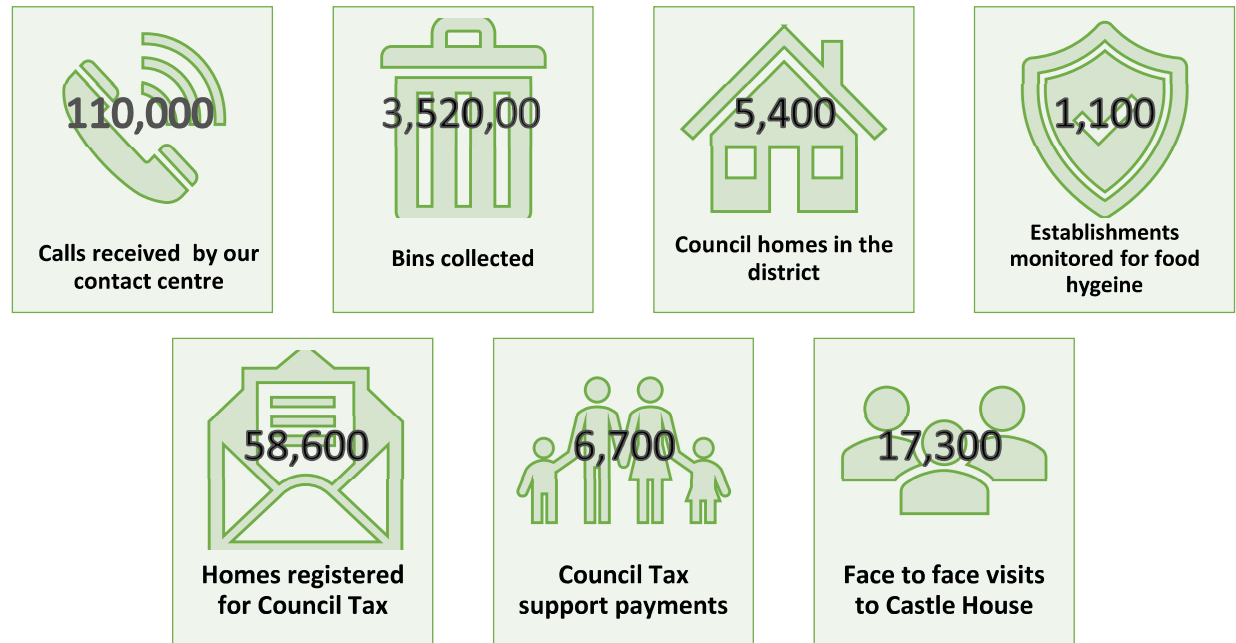
Our policy meets the requirements of the statutory Housing Ombudsman Complaint Handling Code. The Local Government and Social Care Ombudsman have issued their Code as "[advice and guidance](#)" and we are working to ensure we meet there requirements.



## Our Responsibilities

From waste management and housing to food hygiene and financial support, these services play a critical role in enhancing the quality of life for residents. The council's commitment to maintaining and improving these services is evident in the scale of its operations and the positive impact on the community. Feedback is received for all these services. Some data to provide context can be found in fig 2 below, which was correct as of 2024/25:

Fig 2 - Our Responsibilities



(All Figures are approximate)

### 2. Overview of feedback

Table 1 provides a summary of all customer feedback received during the second half of 2024–25.

Table 1 – Overview of feedback

Stage 1 Complaints	Stage 2 Complaints	Suggestions	Compliments (Praise)
305	42	20	75

All figures shown include withdrawn complaints, unless otherwise specified. These typically involve enquiries initially submitted as complaints/suggestions, but, upon investigation, are found to be service requests. In such cases, the customer is contacted, and if they agree, their report is withdrawn and reclassified as a service request.

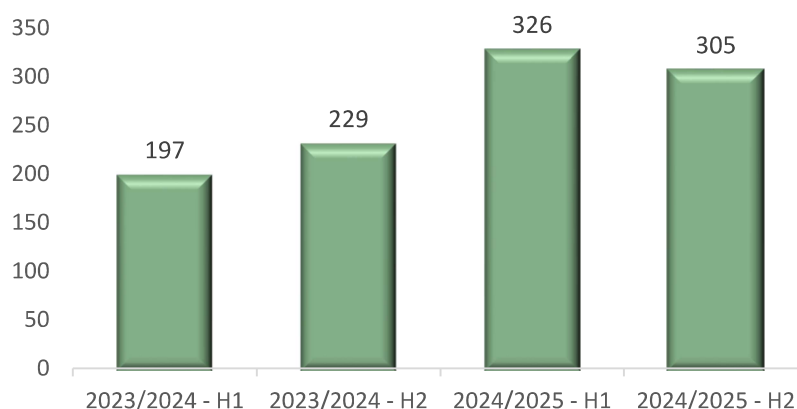
### 3. Complaints – Stage 1

It is essential for us to employ a variety of methods to engage and consult with our customers, to obtain as broad and representative a view of our services as possible. Complaints serve as a valuable source of information, helping us identify areas for improvement and providing insight into where we are delivering satisfactory service.

#### 3.1 Number of Stage 1 Complaints received

While the number of Stage 1 complaints rose significantly between H1 2023/24 and H1 2024/25, peaking at 326, there has been a notable decrease in H2 2024/25, with complaints falling to 305. This marks the first decline since the upward trend began, suggesting potential stabilisation or early impact of recent improvements

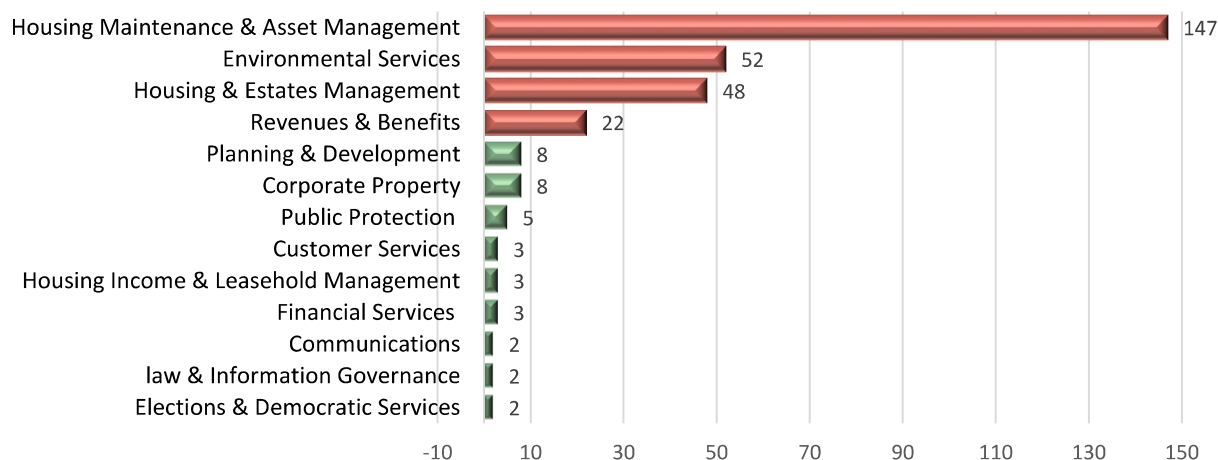
Chart 1 (2-Year trend) - Half years – Stage 1 complaints



#### 3.2. Complaints by Business Unit

In the second half of 2024/25, the distribution of Stage 1 complaints by Business Unit shows that Housing Maintenance & Asset Management received the highest percentage of complaints at 48%, followed by Environmental Services at 17%, and Housing & Estates Management at 16%. Revenues & Benefits accounted for 7% of the complaints received. The remaining units each received less than 3% of the total complaints. A breakdown of complaints by Business Unit is shown in chart 2, followed by a short summary of the services receiving the highest number of complaints.

Chart 2 (Stage 1 complaints received by business unit)



Complaints have increased by 60% when compared with the same period in 2023/24. The largest proportion of complaints received for the service were for service delivery (delays) with 55 cases, highlighting issues with timeliness within the service. Complaints related to officer performance—including quality of work, service decisions, and conduct—collectively account for 54 complaints, indicating concerns with staff behaviour and effectiveness. Additionally, contractor performance and customer communication each received 14 complaints. Less frequent, but still relevant issues include missed actions, lack of responsiveness, and one case of dangerous driving. One complaint for the Business Unit was subsequently withdrawn.

Chart 3 (2-year outturn Stage 1 complaints)

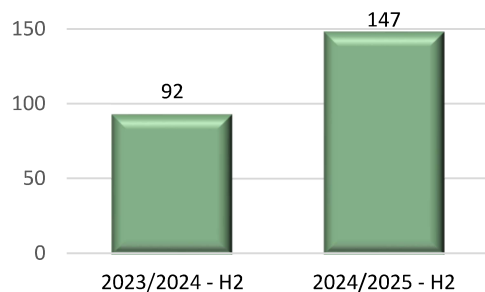
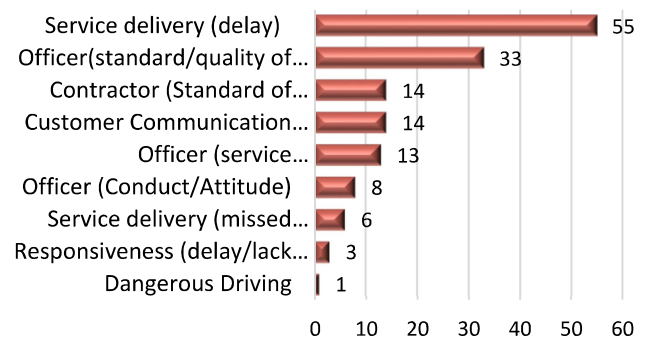


Chart 4 (Stage 1 complaints by category)



*All Figures shown include complaints withdrawn. This provides a more accurate measure of demand.*

### Environmental Services – 52 complaints received.

The Environmental Services delivery teams have seen a 4% increase (increase of 2 complaints) in complaints compared to the same period in 2023/24. The most frequent categories were related to service delivery, including missed actions, 16 complaints, followed by service delivery delays and officer conduct/attitude, each with 9 complaints, and officer standard/quality of work with 7 complaints, highlighting operational lapses and staff performance as key areas of concern within the Business Unit. The remaining complaints were distributed across further categories, in smaller or similar numbers.

Chart 5 (2-year outturn Stage 1)

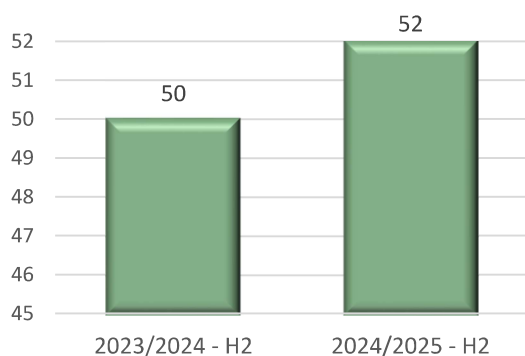
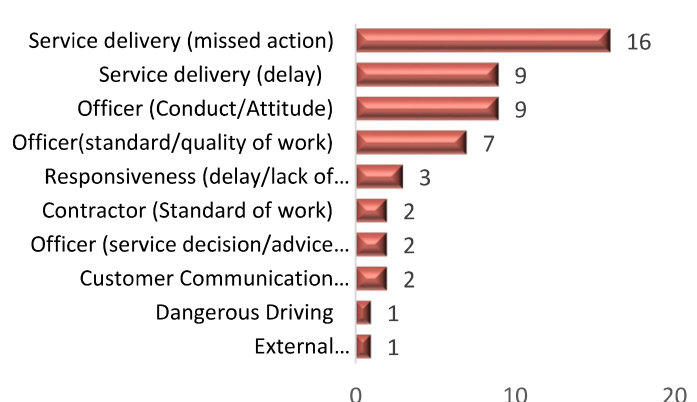


Chart 6 (Stage 1 complaints by category)



*All Figures shown include complaints withdrawn. This provides a more accurate measure of demand.*



### Housing & Estates Management – 48 Complaints received.

In the second half of 2024/2025, Housing & Estates Management recorded 48 Stage 1 complaints, marking a 50% increase from 32 complaints in the same period of 2023/2024. The most frequently reported issues were; Officer Conduct/Attitude and Officer Standard/Quality of Work, each accounting for 10 complaints, together making up 35% of the total. Customer Communication was cited in 7 complaints (12%), highlighting ongoing concerns around staff behaviour, performance, and clarity. The remaining categories—Contractor Standard of Work, Officer Service Decision/Advice, Service Delivery (Delay), and Responsiveness (Delay/Lack of Action) were also received in smaller or similar numbers.

Chart 7 (2-year outturn Stage 1 complaints)

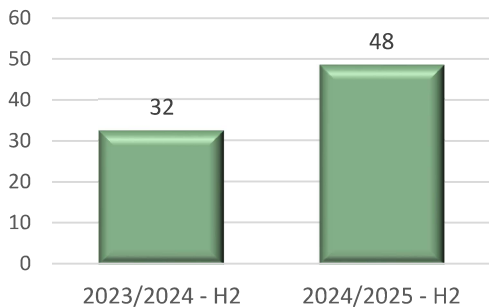
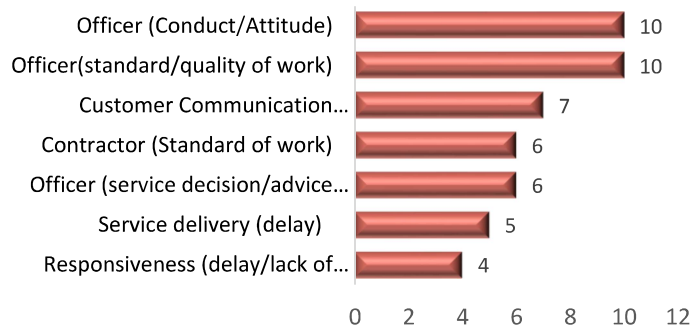


Chart 8 – Stage 1 complaints by category



*All Figures shown include complaints withdrawn. This provides a more accurate measure of demand*

### Revenues & Benefits - 22 Complaints received

Revenues & Benefits recorded a total of 22 complaints, an increase from 15 in the same period of 2023/2024. The most common issues reported were related to customer communication (6 complaints), officer service (5), and responsiveness, including delays or lack of response (3). Other concerns included officer conduct and service delivery delays or missed actions (2 each), as well as the standard or quality of work by contractors and officers (1 each).

Chart 9 - 2-year outturn Stage 1 complaints

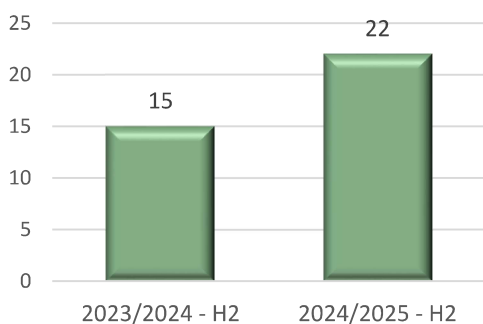
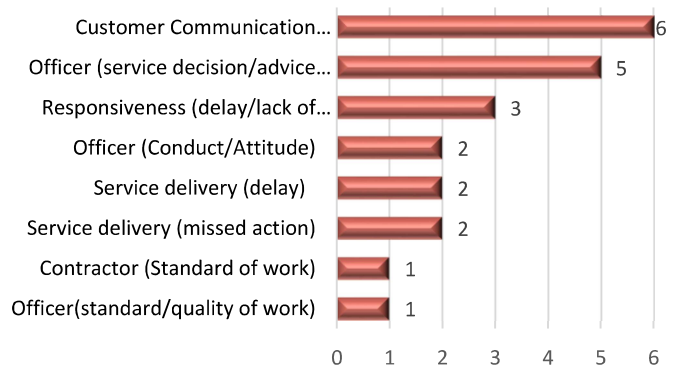


Chart 10 – Stage 1 complaints by category



*All Figures shown include complaints withdrawn. This provides a more accurate measure of demand*

### 3.3 Complaints by Category

Table 2 highlights that the most common category of complaints is related to service delivery delays (24%), and standard/quality of officers' work (19%). Issues with customer communication (12%) Reports of officer conduct/attitude and service decisions or advice each made up 11%. Complaints about missed actions in service delivery (9%) and contractor work quality (8%) are notable as well. Overall, service delivery and officer-related issues appear to indicate the need for improvements in these areas, along with better communication and responsiveness to customer concerns.

Table 2 (Stage 1 complaints by category)

Complaints Category	Received	% of total
Service delivery (delay)	72	24%
Officer (standard/quality of work)	57	19%
Customer Communication (delays/lack of)	37	12%
*Officer (Conduct/Attitude)	34	11%
Officer (service decision/advice provided)	34	11%
Service delivery (missed action)	28	9%
Contractor (Standard of work)	24	8%
Responsiveness (delay/lack of action)	14	5%
External agent/contractor (Conduct/Attitude)	3	1%
Dangerous Driving	2	1%
<b>Total</b>	<b>305</b>	<b>100%</b>

A closer look at the top category of “Service delivery (delay)” shows that, of the 72 complaints received for this category, 55 (76.4%) were received for the Housing Maintenance & Asset Management Business Unit.

Issues included:

- **Extended Resolution Times:** 40 complaints were not resolved within the stipulated time frames, leading to dissatisfaction among residents. Delays in addressing urgent issues like heating and hot water repairs significantly impacted residents' quality of life.
- **Communication Gaps:** 35 complaints highlighted inadequate communication with residents regarding the status of their complaints and expected resolution times. Missed appointments and lack of follow-up calls contributed to frustration and mistrust.
- **Resource Allocation:** 30 complaints highlighted perceived staff shortages, suggesting there were not enough skilled personnel to handle the volume of complaints efficiently. Additionally, delays in ordering and receiving necessary parts for repairs further exacerbated the problem.

Some complaints involved multiple issues, such as both extended resolution times and communication gaps, which is why the numbers for each issue overlap. This indicates that several complaints were multifaceted, addressing more than one area of concern.

*“It is not unusual that the customer facing business units typically receive a higher volume of complaints due to the nature of the work being carried out by these teams and in the case of Housing Maintenance and Asset Management, how intrinsically linked this service is to the lives and homes of our tenants. We encourage all customers to provide feedback to us, whether positive or negative, and because of this feedback we recognise that this is an area in which improvement is required. We have recruited a complaints co-ordinator to help this business unit with ensuring complaints are responded to in time, also enabling officers to focus on rectifying service failures and implementing improvements and are taking steps to increase the level of resources within the business unit for identified pinch points. Some of these complaints also relate to the performance of our contractors and we are working with them to improve their services and response times”.*

\*Note: The complaints category 'Officer (Conduct/Attitude)' is a broad category that does not only cover the behaviour of an officer but could also include a complaint raised for either

- noise during a waste collection
- response given by the officer was deemed not suitable or
- the behaviour and/or attitude of the officer.

Work is ongoing to review the categories to refine them for increased clarity.

### 3.4 Processing Times

To ensure compliance with the Housing Ombudsman's complaint handling code, it is necessary for our policy to include specific timescales for responding to complaints. The council is currently updating its recording systems to reflect these new requirements, which will be applied to all complaints from April 2025 onward.

- Stage 1 - acknowledge the complaint within 5 working days of the request being received and provide a full response within 10 working days.
- Stage 2 -acknowledge the complaint within 5 working days of the escalation request being received and provide a full response within 20 working days.

It is important that we take complaints seriously and meet the timescales of our policy and the Housing Ombudsman. When a customer has complained to us it is right that they expect a response within a reasonable timescale. There will be occasions where the timescales need to be extended in cases where obtaining the relevant information may take longer as it's from a third party or because an officer who had dealt with the customer is on leave. Wherever this delay is necessary, the complainant will be kept updated.

Table 3 below summarises the number of complaints that met or missed statutory deadlines. The significant increase in complaint volume during this period has impacted our ability to meet response targets. Investigations are ongoing to understand the reasons behind missed deadlines.

Table 3 (Stage 1 Complaint processing summary)

Period	Met Deadline	Missed Deadline	Total completed	% on Target
October - March 2023/24	194	22	216	90%
October - March 2024/25	139	157	296	47%

*7 Withdrawn and 2 suspended complaints are excluded from the above calculations*

In the second half of 2024/25, 305 Stage 1 complaints were received. Of these, 7 were withdrawn and 2 suspended, leaving 296 to be processed. Of those, 47% (139) were responded to within the statutory deadline—a significant drop from 90% (194 of 216) during the same period in 2023/24. This decline is attributed to a higher volume of complaints being received, resource challenges, and previously there were some difficulties with the complaint's software, which have now been resolved. The post of Complaints Coordinator has since been appointed within the Housing, Health & Wellbeing Directorate and will be responsible for managing complaints received at stage 1. In addition to this, a new process to improve response times Council wide, is being introduced and will be led by the Director of Customer Services and Organisational Development.

Table 4 – (Late responses by delivery team – Stage 1

Delivery Team	Received	Overdue	%
Housing Maintenance & Asset Management	147	120	82%
Housing & Estate Management	47	21	45%
Waste & Transport	48	13	27%
Planning Development	8	4	50%
Council Tax	19	2	11%
Corporate Property	8	2	25%
Public Protection	2	1	50%
Legal	2	1	50%

*Excludes complaints which were withdrawn/suspended and Teams with all complaints dealt with on time.*

During the second half of 2024/25, Housing Maintenance & Asset Management had the highest percentage of overdue complaints with 120 out of 147 responses exceeding statutory response times. Planning Development and Public Protection both had 50% of their complaints overdue. The increase in complaint volume, coupled with the announcement of new response deadlines, is believed to be impacting these figures.

### 3.5 Outcome of Complaints

Once the officer responsible for responding to a complaint has undertaken the appropriate investigation they will determine if the complaint was fully upheld, partially upheld, or not upheld. In writing the response they clearly state the outcome and record this within the ESB system.

It is important to note that sometimes customers are unhappy with a decision or process but upon investigation it is found that the council has acted appropriately, and these complaints are not upheld.

Often complaints contain more than 1 issue, complaints partially upheld are where some of the issues raised are upheld but others are not.

Complaints that haven't been decided may be addressed after the reporting period and will be included in future reports once their decision process is complete.

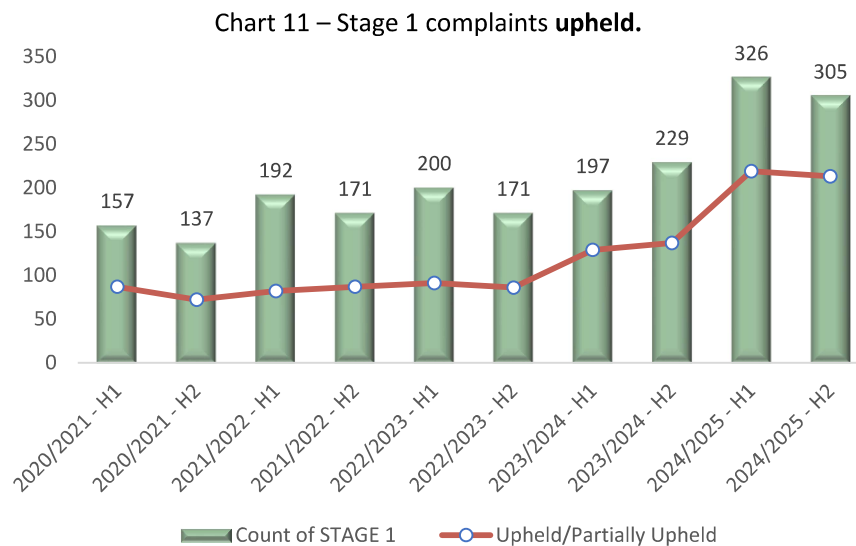
Table 5 (decision status of stage 1 complaints)

Complaints Upheld	Complaints Partially Upheld	Complaints Not Upheld	Complaints not decided
149	64	72	11

*\*2 complaints were suspended and 7 were withdrawn from the process*

On further examination of our data over a period of 5 years, there is a clear upward trend in the total number of complaints over the periods, with a significant peak in 2024/2025-H1 (chart 9).

The number of upheld or partially upheld complaints has been gradually increasing, indicating a trend towards more complaints being acknowledged, suggesting that the standards for upholding complaints might be evolving or that more complaints are meeting the criteria for being upheld.



### 3.6 What have we learned?

Analysis of our customer feedback allows us to identify and address specific service issues effectively. Table 6 highlights examples of actions taken in response to customer complaints, demonstrating our commitment to continuous improvement. These examples reflect how we translate feedback into service enhancements. Most upheld complaints have led to recorded improvements and lessons learned.

Table 6 (Lessons learned)

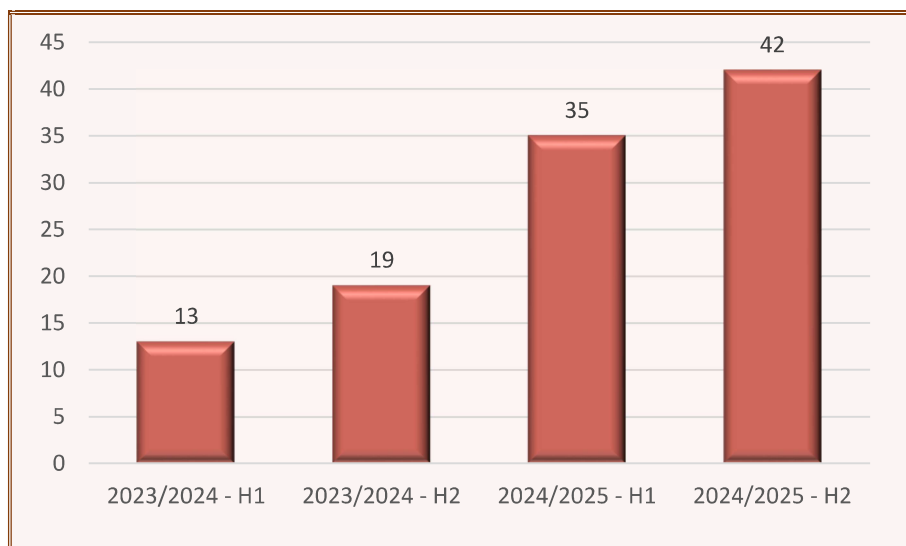
Area of concern	Action taken to improve
<b>Corporate Property</b>	
At Tolney Lane Riverside car park, visitors were unable to access the advertised free Christmas parking. Payment was required as there was no option to obtain a free ticket.	The parking machine software had failed on this occasion. We are amending signage in place to include instructions to customers for them to continue to park for free without displaying the free parking ticket when the machines are out of use.
<b>Housing Maintenance &amp; Asset Management</b>	
Damage occurring during repairs to the exterior of a property. Plaster was knocked off the wall, exposing brickwork, and glue has been spilled on the floor.	Works carried out by Compliance Team appear to have fallen in between different contractors and agency staff being used. Difficult to track works carried out and any QC checks undertaken before sign-off and payment. Discussed as part of processes and procedures with current interim Compliance team members.
No heating or hot water for 3-4 weeks in council home. Despite multiple requests to repair. The cause has not yet been identified. This is causing distress for the tenants.	Changes to process for updating Contractor of newly acquired properties, and additions to the gas contract have been made.
Dissatisfaction with service provided by Out of Hours Repairs. The inside window glass of a rear double door was accidentally smashed, posing a clear danger. Despite this, the issue was not classified as an emergency, and the residents were required to secure the window themselves. The resident explained that the window had been unstable since they moved into the property, contributing to the breakage.	Updated Repairs Supervisors and emailed to ensure that operatives make safe damaged double-glazed units, even if only one pane is damaged. This will also be picked up as part of the wider Out of Hours service review.
A report was made regarding outstanding repairs. The tenant is still waiting for repointing work to be completed after the scheduled date was missed without notification. Despite multiple calls to inquire about the delay, no satisfactory response was received.	The team was reminded to communicate with tenants regarding appointments. Supervisors were instructed to ensure operatives notify them and works planners if tasks cannot be completed, preventing tenants from being unaware of cancellations.
<b>Regenerations &amp; Housing Strategy</b>	
A complaint was raised regarding the conduct of a tenant during a meeting about the new response and repairs policy. The tenant accused the complainant of shouting repeatedly and name-calling due to a disagreement. The complainant found the tenant's behaviour highly inappropriate and aggressive.	Creation of a meeting protocol for involved tenants, to outline conduct and behaviour expectations. To be led by Tenant Engagement Team, developed in collaboration with tenants.
<b>Revenues &amp; Benefits</b>	
A resident, who recently purchased a house was sent a letter requesting payment. The resident set up a direct debit to pay in three instalments, as specified in the letter. However, the entire amount was charged at once.	A review identified that the wording for the payment option, which provided instalments only through January, was unclear. The customer chose this option, leading to confusion. The wording has been amended to clearly indicate the number of instalments being chosen.

#### 4. Complaints - Stage 2

Stage 2 complaints are those where a customer remains dissatisfied with the response received at Stage 1. Reviewing these in detail allows us to identify opportunities for service improvement and assess the effectiveness of our initial responses. Although the overall number of complaints remains proportionally small compared to the volume of services delivered, Stage 2 complaints provide valuable insight into more complex or unresolved issues.

In the second half of 2024/25, 42 Stage 2 complaints were received—an increase of 23% compared to 35 in the previous period. This continues a two-year upward trend, suggesting either increased complexity in complaints or challenges in resolving issues at Stage 1.

Chart 12 (2-Year trend)- half years



*Includes withdrawn and suspended complaints at this stage*

Of the 42 Stage 2 complaints received in the period, 25 were upheld with a further 4 being partially upheld (table 7)

Table 7 (Stage 2 Complaints)

Complaints Upheld	Complaints Partially Upheld	Complaints Not Upheld	Complaints not decided/in progress
25	4	12	1

Of the 42 complaints processed during Half 2, 40% met the response deadline of 15 working days (table 8)



Table 8 (Stage 2 processing deadlines)

Period	Met Deadline	Missed Deadline	Total completed	% on Target
October 2024 – March 2025	17	25	42	40%

The highest rate of overdue responses was recorded in Housing Maintenance & Asset Management, where 16 of 22 complaints (72.7%) missed the deadline. Revenues & Benefits and Environmental Services processed all of their Stage 2 complaints within the required period.

Table 9 (Stage 2 processing times by BU)

Business Unit	On Time	Overdue	Grand Total
Housing Maintenance & Asset Management	6	16	22
Planning Development	1	2	3
Public Protection		1	1
Revenues & Benefits	1		1
Housing Estates & Management	5	6	11
Environmental Services	4		4
<b>Grand Total</b>	<b>17</b>	<b>25</b>	<b>42</b>

All stage 2 complaints are thoroughly reviewed during the development of this report, including all related correspondence exchanged throughout the life of the complaint. This helps clarify why each complaint escalated to stage 2 and what could have been done differently at stage 1 to resolve it earlier. Table 10 highlights the most common themes, helping to sense check whether resources and attention are being appropriately focused in the right areas.

Table 10 (Stage 2 Complaints by Category)

Category of Complaint	No.	%
Housing - Time Taken to Complete Repair (Repairs)	11	26%
Staff Conduct	7	17%
Housing - Quality of Repair Work (Repairs)	4	10%
Housing - Standard of Accommodation	4	10%
Communal Area	3	7%
Communication	3	7%
Housing - Quality of Repair Work (Assets)	2	5%
Communication and staff conduct (contractor)	1	2%
Contractor - Customer Service (Repairs)	1	2%
Customer Communication (Delays/Lack of)	1	2%
Housing - Time Taken to Complete Repair (Assets)	1	2%
Multiple issues - Staff conduct, outstanding repair issues, lack of support	1	2%
Neighbour Issue	1	2%
Outcome of Council Decision	1	2%
Waste - Contamination of Recycling	1	2%

## 5. Ombudsman Complaints

Each Ombudsman produces Annual Review Letters detailing how many complaints they have received for individual councils and how many decisions they have made. These are reported to the Audit and Governance Committee. Table 11 below summarises the number of complaints received by the Local Government and Social Care Ombudsman (LGSCO) for the previous 4 years.

Table 11 (LGSCO complaints decisions)

Year	Decided by the LGSCO	Number Upheld
April 2024 - March 2025	9	1
April 2023 – March 2024	9	0
April 2022 – March 2023	9	0
April 2021 – March 2022	12	0
April 2020 - March 2021	11	1

For the financial year 2024/25, the LGSCO has published nine decisions. Eight were closed after initial enquires and one was upheld as follows:

- *In 2023, the Council acknowledged a statutory nuisance but did not act promptly to begin a formal investigation. Additionally, the information provided to the complainant was inconsistent. Following a review, the Council has accepted that there were delays and communication issues. It has agreed to issue a formal apology and make a symbolic payment in recognition of the inconvenience caused.*

The LGSCO have published two good practice guides aimed at helping authorities to get things right before cases are escalated:

- Appendix 1. [Section 117 Aftercare guidance \(lgo.org.uk\)](https://lgo.org.uk/section-117-aftercare-guidance)
- Appendix 2. [Guidance for practitioners: Deprivation of Capital \(lgo.org.uk\)](https://lgo.org.uk/guidance-for-practitioners-deprivation-of-capital)

The Housing Ombudsman outcomes for the past 4 years are shown in Table 12.

Table 12 (Housing Ombudsman complaints decisions)

Year	Decided by the HO	Number Upheld
April 2024 - March 2025	2	2
April 2023 – March 2024	1	0
April 2022 – March 2023	1	0
April 2021 – March 2022	1	0
April 2020 - March 2021	1	0

For the financial year 2024/25, the Housing Ombudsman has published 2 decisions, both of which were upheld:

1. *The Housing Ombudsman reviewed a complaint about Newark and Sherwood District Council's handling of damp and mould in a resident's home. The resident, who has mental health issues and young children with respiratory problems, reported several problems. The council did not fix these issues quickly, causing ongoing distress. The Ombudsman found the council's response inadequate, and the council acknowledged this, apologized, and paid £600 in compensation. They also committed to completing the necessary repairs and mould treatment promptly.*
2. *A resident with Asperger's and ADHD, along with his partner who has mental health vulnerabilities, reported antisocial behaviour from a neighbour, including noise, late-night gatherings, and drug use. The landlord's response was inadequate, failing to conduct a risk assessment, offer mediation, or liaise effectively with the police, leading to distress for the resident. The Ombudsman found maladministration and service failure in the Councils handling of the complaint, ordering £750 compensation, a written apology, and an internal review to improve ASB handling and record-keeping practices.*

## 6. Suggestions

During the period, 20 suggestions were initially received. Upon examination, one suggestion was identified as a service request and another as a complaint. Additionally, three suggestions were subsequently withdrawn. Table 13 provides a sample of the suggestions received.

Table 13 (Suggestions)

Suggestion	Response
<b>Communications</b>	
Suggestions on how to make it easier for people who are sight impaired or not computer literate Increase contrast between text and background. Using black and white, avoid grey buttons. Larger buttons are easier to see and click. Please pass to your Disability Access officer and carry out a review of the website to increase accessibility	We have an accessibility guide that we follow to ensure our website meets accessibility standards. We also use a dedicated tool to regularly assess and maintain the accessibility of our site. Additionally, we are preparing to present a report to the Senior Leadership Team in the coming weeks regarding the site's accessibility, which may include a proposal to transition to a new content management system to further enhance accessibility.
<b>Corporate Property</b>	
A customer raised concerns about accessibility at the London Road car park. They highlighted the lack of dropped kerbs or safe access routes to the footpath, requiring wheelchair users to navigate behind parked cars to reach their destination. The customer suggested removing one parking bay to install a drop kerb and improve access	Newark and Sherwood District Council acknowledges the accessibility issue raised and appreciates the feedback. In response, planned works will include the removal of one parking space, installation of cross hatching for disabled access, and the addition of a dropped kerb to improve wheelchair access. These improvements are expected to be completed within 8–10 weeks, pending coordination with other scheduled works.

Suggestion	Response
A resident expressed concern about drivers, including taxis, leaving engines running while parked, particularly near Boots on Stodman Street. They noted this contributes to pollution and breaches anti-idling laws, and suggested enforcement action.	The Council acknowledges that unnecessary engine idling is an offence and has referred the matter to its enforcement and transport teams to consider awareness campaigns and targeted enforcement in key areas. However, the Council does not have powers to enforce pavement parking unless it occurs in marked bays or restricted areas; obstructive parking must be reported to the Police via 101.
<b>Economic Growth</b>	
As I am disabled and cannot walk far, I must go shopping to Retford as they have a mobility scooter hire service for blue badge holders. I would visit Newark more if this was available and am sure a lot of other people would too.	Thank you for taking the time to provide the suggestion for a mobility scooter hire service in Newark. It is not something currently planned for in our service areas, however, we will take your suggestion on board and consider it in line with any suitable future funding programmes.
<b>Environmental Services</b>	
A resident reported that the general waste bin in the centre of Fleming Drive Park frequently overflows with dog waste, likely due to its location near the park entrance. They suggested installing a dedicated dog waste bin with a lid next to the existing bin to reduce odour, improve hygiene, and prevent fly attraction.	The Council has acknowledged the issue and agreed to explore the installation of an additional lidded litter bin in the centre of the park to help manage waste more effectively

## 7. Praise (Compliments)

Compliments help us understand what our customers value and highlight good practices. This includes compliments directed to the Council by customers regarding the quality of service provided by individual staff members or service teams. Occasionally, customers have submitted a compliment instead of a complaint. To prevent confusion, we have amended the wording to "Praise."

I want to extend a huge thank-you to your repairs team and the lady I spoke to this morning at 9am. I was in an absolute state regarding a problem with our waste and in a real panic. An emergency repair / assessment was promptly scheduled. Speaking to someone who genuinely wants to help and understands the stress caused by home issues made a world of difference. We have recently had a spate of repairs, and the service has been brilliant. It has been a straightforward process, and I am super grateful. Thankyou

Chart 13 (Praise Themes)

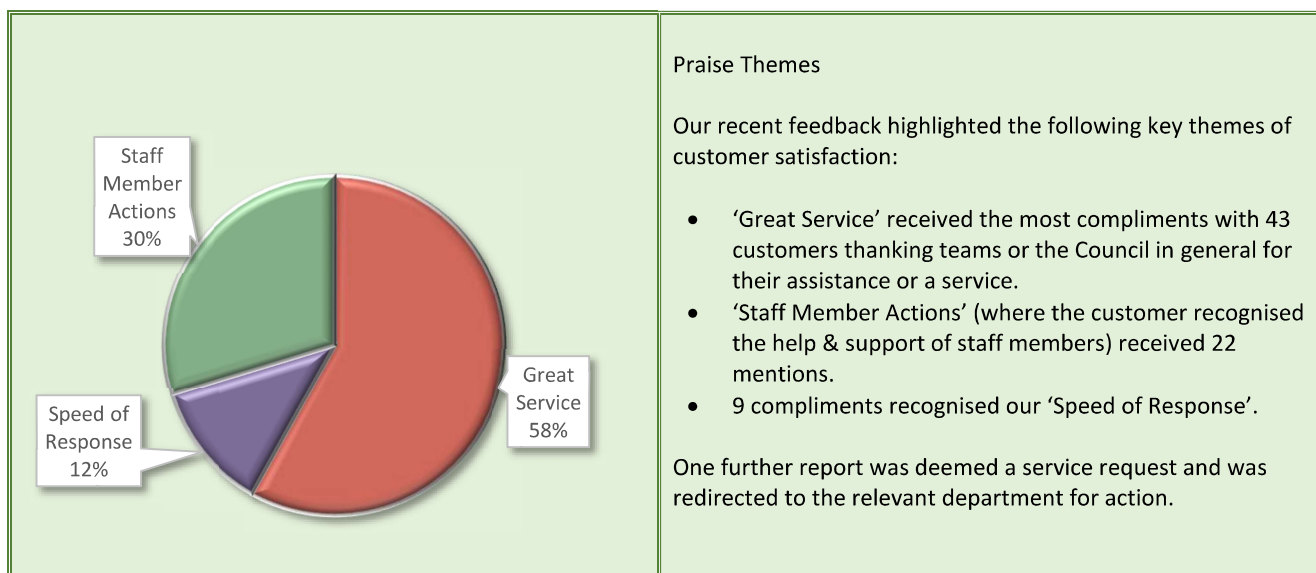
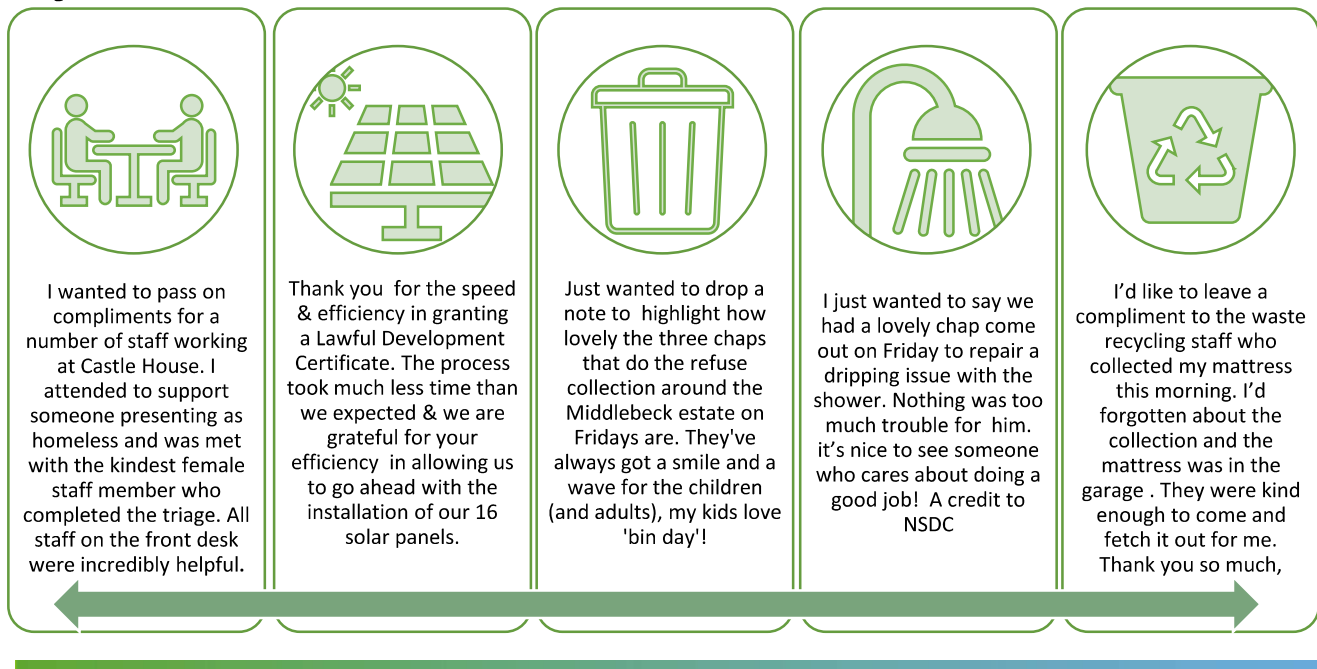


Chart 14 (praise by BU)



## Compliments Examples

Fig 3

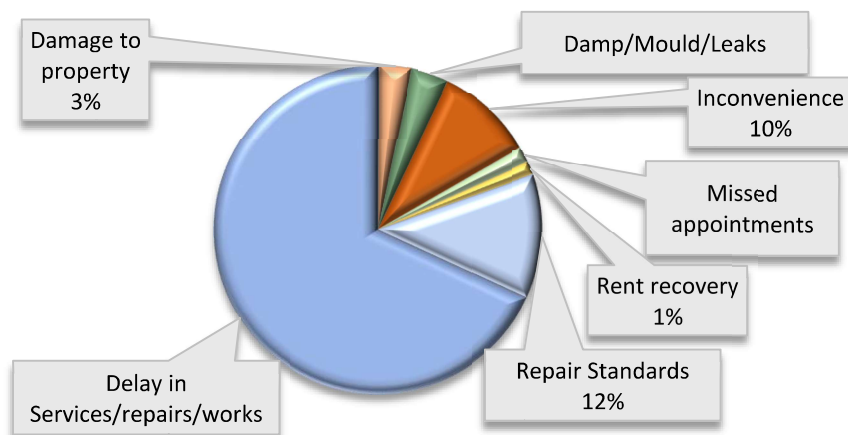


## 8. Putting it Right

Compensation serves as a remedy for any inconvenience or distress caused by service failures within the Council's social housing. Each claim will be evaluated individually. The compensation amount will reflect the level of inconvenience, disturbance, and distress experienced due to delays in resolving the issue, and the extent of the Council's responsibility. Additionally, the Council will consider whether the time taken to resolve the problem was excessive.

Sixty-seven claims were awarded compensation in the period 01 October 2024 – 31 March 2025 (Half 2 2024/25) amounting to a total of £16,353; representing a 167% increase from the £6,135 paid out during the same period in 2023/24. Chart 15 shows the percentage of the total awards in each category. Table 14 displays the costs awarded in each category in comparison to the same period in 2023/24.

Chart 15 - Categories



The highest single category is Delay in Services/Repairs/Works, increasing from £4,180 in half 2 2023/24 to £5,707 in the same period 2024/25. These figures reflect a broader and more responsive approach to addressing service-related issues, particularly in housing and maintenance.

Table 14 (Compensation by category)

Category	Half 2 2023/24	Half 2 2024/25
Damage to property	<i>£200</i>	<i>£270</i>
Damp/Mould/Leaks	<i>£231</i>	<i>£3,810</i>
Goodwill	-	<i>£413</i>
Inconvenience	<i>£594</i>	<i>£2,664</i>
Missed appointments	<i>£100</i>	-
Rent recovery	<i>£81</i>	<i>£724</i>
Repair Standards	<i>£750</i>	<i>£1,043</i>
Delay in Services/repairs/works	<i>£4,180</i>	<i>£5,707</i>
Standard of service (Contractor)		<i>£2,098</i>
Total Compensation paid	<i>£6,135</i>	<i>£16,728</i>





Report to Policy and Performance Improvement Committee Meeting, 30th June 2025

Director Lead: Deborah Johnson, Director – Customer Services & Organisational Development

Lead Officer: Mark Randle, Transformation and Service Improvement Officer

Report Summary	
<b>Report Title</b>	Presentation by the Leader of the Opposition, Cabinet Member without Portfolio
<b>Purpose of Report</b>	Update on role of Leader of the Opposition, Cabinet Member without Portfolio
<b>Recommendations</b>	That the Policy & Performance Improvement Committee: a) note the contents of the report.

## 1.0 Background

- 1.1 At the Policy & Performance Improvement Committee (PPIC) meeting held on 29 January 2024, Members agreed a process for Portfolio Holders to be invited to meetings of the Committee. This enabled the Portfolio Holder to brief the Committee on their remit and current and future plans and projects. It would also offer the Committee opportunity to ask focussed questions of the Portfolio Holder. This process ran from March 2024 to March 2025.
- 1.2 At the Policy & Performance Improvement Committee meeting held on 14<sup>th</sup> April 2025, Members agreed to a change in the process for Portfolio Holders attending Committee.
- 1.3 The new change in process requested that Portfolio Holders report back on 'specific areas' of their Portfolio, which will be requested by the Committee. Portfolio Holders are asked to produce a short report in answer to these specific areas. They will present back to the Committee and then take questions.

## 2.0 Proposal/Options Considered

- 2.1 This report relates to the leader of the largest opposition party Cllr Jack Kellas, who sits on the Cabinet without a portfolio.

At the Full Council on Tuesday 8th March 2022 the Council approved the structure for the new governance arrangements which included the introduction of the leader of the Council's largest opposition becoming a Cabinet Member with voting rights, but no portfolio.

Their role is to provide leadership in the constructive challenge of the Council's policies and strategies, and in the co-ordination of alternative policies, strategies and service delivery. They are the main political spokesperson for the Council's opposition.

The Committee requested:

- 1) In your role as the opposition representative on the Cabinet, how have you found the balance between constructive challenge and the acknowledgement of initiatives that provide value to the district and its residents?
- 2) With changes on the horizon through the Local Government Reform (LGR), what will the political challenges be in supporting the delivery of the existing capital programme to ensure continuity after vesting day?
- 3) Do you feel the current structure of the Council is conducive to effective opposition?

### **3.0 Implications**

In writing this report and in putting forward recommendation's, officers have considered the following implications: Data Protection, Digital and Cyber Security, Equality and Diversity, Financial, Human Resources, Human Rights, Legal, Safeguarding and Sustainability, and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

### **Background Papers and Published Documents**

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

- **Full Council Report 8<sup>th</sup> March 2022** – Proposals for the new governance arrangements.
- **PPIC Report 29 January 2024** - Attendance by Portfolio Holders to Future Meetings of the Policy & Performance Improvement Committee
- **PPIC Report 14 April 2025**- Attendance by Portfolio Holders to Future Meetings of the Policy & Performance Improvement Committee



Report to: Policy & Performance Improvement Committee – 30 June 2025

Director Lead: Deborah Johnson, Director of Customer Services & Organisational Development

Lead Officer: Carl Burns, Transformation & Service Improvement Manager, Rowan Bosworth-Brown, Senior Transformation & Service Improvement Officer

Report Summary	
<b>Report Title</b>	Out of Remit Activities (OoRA) Working Group Update
<b>Purpose of Report</b>	To update members of the Policy Performance and Improvement Committee (PPIC) on the progress made by the OoRA Working Group to date and seek endorsement for two recommendations relating to flood resilience.
<b>Recommendations</b>	<p>That the Policy and Performance Improvement Committee:</p> <ul style="list-style-type: none"> <li>a. Endorse the recommendation that NSDC write to the East Midlands Combined County Authority (EMCCA), to request a renewed focus and further support on building flood resilience for the communities of Newark and Sherwood</li> <li>b. Endorse the recommendation to invite the Environment Agency to the meeting of the Policy and Performance Improvement Committee scheduled to take place 1 December 2025</li> <li>c. Note the progress of the Working Group to date</li> </ul>

## 1.0 Background

In January 2025 a topic request form was submitted by Cllr Paul Peacock to review 'Out of Remit Activities'. The rationale for this subject was that the Council's resources are stretched and coming under increasing pressure. There is no single explanation for this but a combination of factors which are placing a strain on our capacity to deliver. By ensuring we scrutinise our commitments we can clearly define areas in which we occupy a wider community leadership role, a role of influence only and those in which we are a direct service provider.

As such it was approved by the Chair of PPIC to form a working group to consider any activities the Council are committed to outside of its remit as a District Council and balance the benefits to our residents with the impact on the Council's resources.

The Out of Remit Activities Working Group is Chaired by Cllr Rhona Holloway and met for the first time on Wednesday 2 April 2025. The agenda included the introduction Review Initiation Document (RID), which is the guiding document for the group which will help retain focus and consists of the objectives & key questions, as well as the scope of the review. This was agreed by members.

The group acknowledged that whilst the Council deliver in several areas that could be classified as 'discretionary' making recommendations against of these is not in the remit of the Working Group. Rather, the group hope to map the activities by where the Council steps into spaces that should be delivered by someone else.

The first of these areas was flood resilience at the meeting held on 4 June 2025. The group received an informative presentation from the director of Communities and Environment, as well as the Business Manager for Public Protection. The group were able to find out more about this function from the perspectives of both flood response and flood resilience, our role under the Civil Contingencies Act 2004 as Category 1 responders and apply scrutiny as appropriate.

## **2.0 Proposal/Options Considered**

- a. In November 2024, the Council, alongside Bassetlaw District Council, hosted a Flood Impacts and Mitigation session. The purpose of this session was to outline the history of flooding locally, what risk that poses to our communities and the impact that has in the case of an emergency response being declared. The session also outlined some of the actions that have been taken at a local level to build resilience and develop closer working relationships with some of the key flood partnership agencies.

The session also focused on some of the issues and challenges being experienced, which sit at a regional and national level and explored what the solutions are to address some of these known challenges. The session ended with a focus on the support required from EMCCA, which consisted of the following three points:

1. Broker a meeting with relevant Ministers to push for action regarding funding
2. Use convening powers to scope the potential formation of an East Midlands Flooding Taskforce which aims to:
  - Shape cross authority flood alleviation planning
  - Link EA flood alleviation priorities with strategic investment/growth funding
  - Dovetail flood mitigation with enhanced green spaces
  - Create a platform for a strong regional voice on flood alleviation
3. Advocate for government investment into flood alleviation in the region

There has been formal communication with EMCCA to this end, however the Working Group agree that it would be appropriate to recommend that Cllr Paul Peacock write to EMCCA on behalf of Newark and Sherwood District Council to shine a spotlight on this topic, expressing once more the severity of the impact that is felt by our communities in relation to incidents of flooding and bring this issue back to the forefront of the EMCCA.

- b. The Working Groups second recommendation in relation to flood resilience is that some of the key partner agencies, including the Environment Agency, be invited to attend a meeting of the Policy and Performance Improvement Committee. The purpose of extending this invitation to these agencies is to enable Members of PPIC to hear from the experts on what work is ongoing within Newark and Sherwood, enable the opportunity to ask questions on behalf of local communities to these agencies, as well as to apply a level of scrutiny, where appropriate, to the service being received across Newark and Sherwood.

### **3.0 Implications**

In writing this report and in putting forward recommendations, officers have considered the following implications: Data Protection; Digital & Cyber Security; Equality & Diversity; Financial; Human Resources; Human Rights; Legal; Safeguarding & Sustainability and where appropriate they have made reference to these implications and added suitable expert comment where appropriate.

### **Background Papers and Published Documents**

Except for previously published documents, which will be available elsewhere, the documents listed here will be available for inspection in accordance with Section 100D of the Local Government Act 1972.

**None**

## Forward Plan

For the Period June 2025 - September 2025



### What is the Plan?

This Forward Plan sets out all of the Key Decisions that are expected to be taken during the period referred to above. The Council has a statutory duty to prepare this document, in accordance, with the Local Government Act 2000 (as amended). The Plan is published monthly and will be available on the [Council's Website](#).

### What is a Key Decision?

The decisions listed in this plan are 'Key Decisions'. A Key Decision is one that is likely to:

- (a) Result in the Council spending or making savings of over £150,000 revenue or £300,000 in capital, or;
- (b) Where the impact of the decision would be significant in terms of its impact on communities living or working in two or more Wards.

Under the Council's Constitution, Key Decisions are made by the Cabinet, Portfolio Holders, or officers acting under delegated powers.

### Exempt Information

The plan also lists those 'Exempt' Key Decisions which are going to be taken over the next four months. Exempt Key Decisions are those decisions which have to be taken in private. This is because they involve confidential or exempt information which cannot be shared with the public.

Agenda papers for Cabinet meetings are published on the Council's website 5 working days before the meeting [here](#). Any items marked confidential or exempt will not be available for public inspection.

Any background paper listed can be obtained by contacting the Responsible Officer. Responsible officers can be contacted on 01636 650000 or [customerservices@newark-sherwooddc.gov.uk](mailto:customerservices@newark-sherwooddc.gov.uk)

Decision to be taken / Report title and Summary	Decision maker	Date Decision to be taken	Responsible Portfolio Holder	Responsible Officer	Exempt y/n and Grounds for exemption	Date decision can be implemented
Purchase of Vehicles for the Rollout of Kerbside Food Waste Collection Service	Cabinet	10 Jun 2025	Leader - Portfolio Holder Strategy, Performance & Finance	Andrew Kirk, Business Manager - Environmental Services Andrew.Kirk@newark-sherwooddc.gov.uk	Part exempt	
Solar Energy Supplementary Planning Document	Cabinet	10 Jun 2025	Portfolio Holder - Sustainable Economic Development	Matthew Norton, Business Manager - Planning Policy and Infrastructure matthew.norton@newark-sherwooddc.gov.uk	Open	
Plan for Neighbourhoods Update	Cabinet	10 Jun 2025	Portfolio Holder - Sustainable Economic Development	Matt Lamb, Director - Planning and Growth Matt.Lamb@newark-sherwooddc.gov.uk	Open	
Rural England Prosperity Fund and UK Shared Prosperity Fund Grants 2025-26	Cabinet	10 Jun 2025	Portfolio Holder - Sustainable Economic Development	Sarah Husselbee sarah.husselbee@newark-sherwooddc.gov.uk	Open	
Review of the Council's Carbon Net Neutral Target	Cabinet	10 Jun 2025	Portfolio Holder - Climate and the Environment	Carl Burns, Transformation and Service Improvement	Open	



Decision to be taken / Report title and Summary	Decision Maker	Date Decision to be taken	Responsible Portfolio Holder	Responsible Officer	Exempt y/n and Grounds for exemption	Date decision can be implemented
				Manager carl.burns@newark-sherwooddc.gov.uk		
Local Nature Recovery Strategy	Cabinet	10 Jun 2025	Portfolio Holder - Climate and the Environment	Matthew Norton, Business Manager - Planning Policy and Infrastructure matthew.norton@newark-sherwooddc.gov.uk, Nick Law nick.law@newark-sherwooddc.gov.uk	Open	
Newark Lorry Park Improvements	Cabinet	8 Jul 2025	Leader - Portfolio Holder Strategy, Performance & Finance	Steven Chitty, Major Capital Projects Delivery Manager steven.chitty@newark-sherwooddc.gov.uk	Part exempt	
Development Plot Adjacent to Newark Lorry Park	Cabinet	8 Jul 2025	Leader - Portfolio Holder Strategy, Performance & Finance	Steven Chitty, Major Capital Projects Delivery Manager steven.chitty@newark-sherwooddc.gov.uk	Part exempt	

Decision to be taken / Report title and Summary	Decision Maker	Date Decision to be taken	Responsible Portfolio Holder	Responsible Officer	Exempt y/n and Grounds for exemption	Date decision can be implemented
Sale of the Hollies to Hope House School	Cabinet	8 Jul 2025	Leader - Portfolio Holder Strategy, Performance & Finance	Shanade Bradley, Estates Officer Shanade.Bradley@newark-sherwooddc.gov.uk	Part exempt	
Management of Open Spaces on new Developments and Fernwood Open Space	Cabinet	8 Jul 2025	Portfolio Holder - Climate and the Environment	Matt Lamb, Director - Planning and Growth Matt.Lamb@newark-sherwooddc.gov.uk	Open	
Biodiversity Net Gain Update	Cabinet	8 Jul 2025	Portfolio Holder - Climate and the Environment	Matthew Norton, Business Manager - Planning Policy and Infrastructure matthew.norton@newark-sherwooddc.gov.uk, Nick Law nick.law@newark-sherwooddc.gov.uk	Open	
Stodman Street Phase 2 - St Marks	Cabinet	9 Sep 2025	Leader - Portfolio Holder Strategy, Performance & Finance	Neil Cuttall, Business Manager- Economic Growth & Visitor Economy	Part exempt	

Decision to be taken / Report title and Summary	Decision Maker	Date Decision to be taken	Responsible Portfolio Holder	Responsible Officer	Exempt y/n and Grounds for exemption	Date decision can be implemented
				Neil.Cuttell@newark-sherwooddc.gov.uk, Kevin Shutt, Housing Development Manager HRA kevin.shutt@newark-sherwooddc.gov.uk		
Newark Town Centre Masterplan and Design Code	Cabinet	9 Sep 2025	Portfolio Holder - Sustainable Economic Development	Neil Cuttell, Business Manager- Economic Growth & Visitor Economy Neil.Cuttell@newark-sherwooddc.gov.uk	Open	

## Topic Request Form

Available on Mod.Gov or by contacting the Democratic Services lead for PPI. To be considered at the next PPI Committee the form must be submitted 20 working days before the next meeting.

<b>Topic Request Form</b>		
Please complete the first section of this form to request that a topic is considered by the Policy and Performance Improvement Committee. Please send the completed form to Helen Brandham		
<b>Section 1: Member Request</b>		
<b>Proposed topic</b>	Review of Estate Walkabouts	
<b>I would like to understand</b> (key lines of enquiry)	I would like to request this topic to be considered. It would enable the PPI Committee to play an active part, whilst learning more about the process in place, once repairs and improvements have been identified, estate walk abouts.	
<b>I think this topic should be considered because</b>	Perceived neglect can diminish tenants' sense of pride in their homes and community. Visual signs of disorder can encourage further disorder	
(if applicable) <b>High level evidence supporting the reason for consideration</b>	N/A	
<b>Proposed by</b> (name of member)	Cllr P. Rainbow	Ward: Southwell Party: Conservative
<b>Seconded by</b> (name of member)	Cllr R Holloway	Ward: Bilsthorpe Party: Independent
<b>Date form is submitted</b>		
<b>Section 2: Officer Recommendation</b>		
<b>Officer comment</b>	The estate walkabout program runs regularly however isn't well attended. Also, issues raised on the walkabouts are not sufficiently followed up which leads to resident frustrations. Whilst a review is needed this is already planned into the business plan of the BM Housing Services and is in part already underway at conversational level. Due to the impact of the implementation of the new housing management system and other work streams this piece of work is slow moving so I recommend a working group to focus the delivery of the review within a realistic timeframe.	
<b>Officer recommendation</b>	A working group	
<b>Officer name</b>	Carl Burns	Role: Transformation & Service Improvement Manager
<b>Date information added</b>	05.06.25	
<b>Section 3: PPI Chair Recommendation</b>		
<b>PPI Chair comment</b>	Estate walkabouts are designed to foster a strong sense of community, ensure transparency in our processes and involve residents in the decisions that affect their living environment. There is however room for improvement in the service as it is	

## Topic Request Form

	currently delivered and I whilst I support a working group approach this will have to be carefully programmed to avoid disruption to the core services of the business unit.	
<b>PPI Chair recommendation</b>	Do undertake a review – Start date pending discussion with the BM Housing Services	
<b>Date information added</b>	19.06.25	Role: Chair PPIC
<b>Next step</b>	Completed form to be taken to PPI on 30.06.25	