

Public Document Pack



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Agenda

Name of Meeting	CORPORATE SCRUTINY COMMITTEE
Date	TUESDAY 11 JULY 2023
Time	5.00 PM
Venue	COUNCIL CHAMBER, COUNTY HALL, ISLE OF WIGHT
Committee Members	Cllrs J Robertson (Chairman), P Spink (Vice-Chairman), R Downer, W Drew, S Ellis, J Lever, R Quigley, C Quirk and K Love
Co-opted Members	Vacancy (IWALC) (Voting), Vacancy (HALC) (Non-Voting)
	Democratic Services Officer: Megan Tuckwell democratic.services@iow.gov.uk

1. **Apologies and Changes in Membership (If Any)**

To note any changes in membership of the Committee made in accordance with Part 4B paragraph 5 of the Constitution.

2. **Minutes** (Pages 5 - 26)

To confirm as a true record the Minutes of the meeting held on 6 June 2023.

3. **Declarations of Interest**

To invite Members to declare any interest they might have in the matters on the agenda.

4. **Public Question Time - 15 Minutes Maximum**

Members of the public are invited to make representations to the Committee regarding its workplan. Questions may be asked without notice, but to guarantee a full reply at the meeting a question must be put (including the name and address of the questioner) in writing or by email to Democratic Services democratic.services@iow.gov.uk, no later than two clear working days before the start of the meeting. The deadline for written questions is Thursday, 6 July 2023.



Details of committee meetings can be viewed on the Council's [website](#). This information may be available in alternative formats on request. Please note the meeting will be recorded and the recording will be placed on the website (except any part of the meeting from which the press and public are excluded). Young people are welcome to attend Council meetings however be aware that the public gallery is not a supervised area.

5. **Progress Update** (Pages 27 - 28)

To receive an update on the progress against the outcomes arising from previous meetings, and to provide an update on any outstanding actions.

6. **Committee's Workplan:**

(a) Forward Plan (Pages 29 - 36)

To identify any items contained within the Council's forward plan which would benefit from early consideration by scrutiny, either before the Cabinet makes a decision or to monitor post-implementation, and should therefore be included in the Committee's work programme. The forward plan can be viewed online [here](#).

(b) Committee's Work Programme 2023-25 (Pages 37 - 44)

To note the content of the current work programme, and to consider the inclusion of any additional items. Members of the public are invited to submit in writing to the Committee possible items for inclusion in its workplan. To approve the scope of identified items:

- Domestic Violence - Perpetrator Programmes

7. **Pre-Decision Scrutiny - Amalgamation of Chillerton & Rookley Primary School with Godshill Primary School** (Pages 45 - 56)

To consider the report on the proposals for the amalgamation of Chillerton and Rookley Primary School with Godshill Primary School, prior to its consideration by the Cabinet on 13 July 2023.

8. **Pre-Decision Scrutiny - Empty Property Strategy** (Pages 57 - 80)

To consider the strategy that sets out the approach to dealing with empty properties prior to its consideration by the Cabinet on 13 July 2023.

9. **Pre-Decision Scrutiny - Acquisition Strategy** (Pages 81 - 96)

To consider the strategy prior to its consideration by the Cabinet on 13 July 2023. This item is to be considered by the Policy and Scrutiny Committee for Neighbourhoods and Regeneration at its meeting held on 6 July 2023.

10. **Capital Programme / Capital Strategy** (Pages 97 - 104)

To consider a report on the lines of enquiry agreed by the Committee at its meeting on 10 May 2022.

11. **Performance Management Framework** (Pages 105 - 112)

To consider a report on the lines of enquiry agreed by the Committee at its meeting on 11 October 2022.

12. **Members' Question Time**

A question may be asked at the meeting without prior notice but in these circumstances there is no guarantee that a full reply will be given at the meeting. To guarantee a reply, a question must be submitted in writing or by email to democratic.services@iow.gov.uk no later than 5pm on Friday 7 July 2023.

CHRISTOPHER POTTER
Monitoring Officer
Monday, 3 July 2023

Interests

If there is a matter on this agenda which may relate to an interest you or your partner or spouse has or one you have disclosed in your register of interests, you must declare your interest before the matter is discussed or when your interest becomes apparent. If the matter relates to an interest in your register of pecuniary interests then you must take no part in its consideration and you must leave the room for that item. Should you wish to participate as a member of the public to express your views where public speaking is allowed under the Council's normal procedures, then you will need to seek a dispensation to do so. Dispensations are considered by the Monitoring Officer following the submission of a written request. Dispensations may take up to 2 weeks to be granted.

Members are reminded that it is a requirement of the Code of Conduct that they should also keep their written Register of Interests up to date. Any changes to the interests recorded on that form should be made as soon as reasonably practicable, and within 28 days of the change. A change would be necessary if, for example, your employment changes, you move house or acquire any new property or land.

If you require more guidance on the Code of Conduct or are unsure whether you need to record an interest on the written register you should take advice from the Monitoring Officer – Christopher Potter on (01983) 821000, email christopher.potter@iow.gov.uk, or Deputy Monitoring Officer - Justin Thorne on (01983) 821000, email justin.thorne@iow.gov.uk.

Notice of recording

Please note that all meetings that are open to the public and press may be filmed or recorded and/or commented on online by the council or any member of the public or press. However, this activity must not disrupt the meeting, and if it does you will be asked to stop and possibly to leave the meeting. This meeting may also be filmed for live and subsequent broadcast (except any part of the meeting from which the press and public are excluded).

If you wish to record, film or photograph the council meeting or if you believe that being filmed or recorded would pose a risk to the safety of you or others then please speak with the democratic services officer prior to that start of the meeting. Their contact details are on the agenda papers.

If the press and public are excluded for part of a meeting because confidential or exempt information is likely to be disclosed, there is no right to record that part of the meeting. All recording and filming equipment must be removed from the meeting room when the public and press are excluded.

If you require further information please see the council guide to reporting on council meetings which can be found at <http://www.iwight.com/documentlibrary/view/recording-of-proceedings-guidance-note>

All information that is recorded by the council is held in accordance with the Data Protection Act 2018. For further information please contact Democratic Services at democratic.services@iow.gov.uk



Minutes

Name of meeting	CORPORATE SCRUTINY COMMITTEE
Date and Time	TUESDAY 6 JUNE 2023 COMMENCING AT 5.00 PM
Venue	COUNCIL CHAMBER, COUNTY HALL, ISLE OF WIGHT
Present	Cllrs J Robertson (Chairman), D Adams, R Downer, W Drew, S Ellis, J Lever, K Love, R Quigley and C Quirk
Also Present	Cllrs I Stephens, D Andre, J Bacon and P Fuller Christopher Ashman, Sharon Betts, Debbie Downer, Laura Gaudion, Wendy Perera, Christopher Potter, Megan Tuckwell and Melanie White
Also Present (Virtual)	Cllrs J Jones-Evans, G Brodie, M Beston, C Jarman and A Garratt

1 Apologies and Changes in Membership (If Any)

Cllr David Adams was in attendance as a substitute for Cllr Peter Spink. It was advised that Cameron Palin (IWALC) had resigned from the committee and a nomination to fill the vacancy was being sought.

The chairman confirmed that he had been given notice of the Regulation 10 general exception notice regarding the marketing exercise for the former Yarmouth CE Primary School site.

2 Minutes

RESOLVED:

THAT the minutes of the meeting held on 9 May 2023 be confirmed as a true record.

3 Declarations of Interest

Cllr Suzie Ellis declared an interest in Minute item 7, School Place Planning, as an associate school governor at Chillerton and Rookley Primary School and Godshill Primary School.

4 Public Question Time - 15 Minutes Maximum

A series of written questions had been submitted in relation to the report on School Place Planning, as follows; Oliver Tucker of Ryde (PQ 14/23), Rebecca Tucker of Ryde (PQ 15/23), Richard Cottell of Ryde (PQ 16/23), Jane Berry (PQ 17/23),

James Ranson of Ryde (PQ 18/23), Vicki Ranson of Ryde (PQ 19/23), Cathryn Grosvenor of Wootton (PQ 20/23), Lora Coombes of Ryde (PQ 21/23), Simon Coombes of Ryde (PQ 22/23), Michael Christopher of Ryde (PQ 23/23), Helen Smallwood of Ryde (PQ 24/23), Lizzie Christopher of Ryde (PQ 25/23), Roisin Mullins-Jacobs of Ryde (PQ 26/23), Jack Jacobs of Ryde (PQ 27/23), Sarah Cottell of Ryde (PQ 28/23), Vicki Humm (PQ 29/23) and Antonio Entrena Urquia (PQ 30/23). The chairman confirmed that a written response would be provided.

Sam Pickard asked an oral question in relation to the proposals to consult on the school closures and sought clarity around the process. The chairman advised that the Cabinet Member for Children's Services, Education and Lifelong Skills would be invited to address this matter at Minute item 7, School Place Planning.

5 Progress Update

The chairman presented the report which provided an overview of the progress against actions and outcomes from previous meetings. It was advised that work was underway to arrange an informal meeting in July 2023 between the committee, Southern Water, and the Environment Agency to discuss flood risk management. It was noted that the Cabinet had not yet responded to the formal request made by members of the committee in March 2023 to view the confidential Floating Bridge settlement. The Deputy Leader confirmed that a written response would be provided. The committee sought further clarity around the request of the committee in January 2023 that the Monitoring Officer determine a suitable solution to bring more awareness to the delegated decision and call-in processes.

RESOLVED:

THAT the progress report be noted.

6 Committee's Workplan:

6a Forward Plan

6b Committee's Work Programme 2022-25

The committee were invited to identify any items contained within the published forward plan that would benefit from early consideration within the committee's own workplan, or one of the policy and scrutiny committees. Consideration was given to the committee's work programme.

It was suggested that a task and finish group be established for councillors to scrutinise and aid in resolving the issues associated with the delivery of affordable housing. The Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health, and Homelessness agreed to request that the Strategic Manager for Housing delivers a presentation to all councillors (to include details on affordable purchase, affordable rental, leasing, and mobile homes) in order for the scope of any potential task and finish group to be established.

RESOLVED:

THAT the forward plan and the Committee's work programme be noted.

7 School Place Planning

Consideration was given to the report which sought the Cabinet's approval to commence a public consultation on the closures of Cowes Primary School, St Mary's Roman Catholic Primary School, and Wroxall Primary School; and to publish a Public Notice to amalgamate Chillerton and Rookley Primary School with Godshill Primary School.

It was advised that since publication of the agenda, the report would no longer be presented to the Cabinet on 8 June 2023. The Cabinet Member for Children's Services, Education and Lifelong Skills was in attendance to provide clarification around the statutory processes and decision-making which led to the decision to withdraw the report. Questions were raised in relation to the release of the report, and it was recommended that the approach to future school place planning proposals should ensure that all affected staff and parents are notified prior to the release of formal reports into the public domain.

Questions were raised in relation to the long-term vision of the council in addressing the challenges which schools face as a result of low pupil forecast numbers and surplus school places. It was agreed that the matter would be considered by the Policy and Scrutiny Committee for Children's Services, Education and Skills with the relevant members of staff in attendance. It was recommended that future reporting on school place planning should include objective detail and narrative which clearly outlined the rationale for shortlisting the chosen schools, in addition to alternative options which had been explored and the reasons as to why those alternatives were not recommended.

RESOLVED:

THAT the report and update be considered and noted.

8 Partnership Arrangements

The Cabinet Member for Finance, Climate Change and Biosphere was in attendance to present the report which detailed the council's approach to partnership arrangements, in order for the committee to be assured that effective outcomes were being delivered. The committee sought clarification around the definition and nature of informal partnerships, and it was suggested that strategic partnerships should be distinguished as part of the remit of the Leader.

Questions were raised around whether the review had led to the re-evaluation of any of the partnerships. Comments were made regarding the requirements for entering into a partnership; particularly with regards the councils interpretation of each type of agreement and why they were deemed suitable for each partnership. The chairman of the Audit and Governance Committee was in attendance and welcomed any thoughts of the committee on partnership arrangements as it related to risk and value for money.

RESOLVED:

THAT the report be considered and noted.

9 QPMR Q4 - 2022-23

Consideration was given to the report which provided a summary of progress against Corporate Plan activities for Quarter 4 of 2022-23 and detailed any issues which required attention (and the remedial action in place to deal with these).

Comments were made regarding the reduction of debt payments, borrowing, and capital expenditure. Questions were raised regarding the housing register, particularly in relation to the number of homeless individuals or those living in temporary accommodation. Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health and Homelessness confirmed that a detailed written response would be provided and circulated to the committee.

Questions were raised regarding planning and enforcement, particularly around the measures in place to address the staffing capacity issues and the potential revaluation of the fees and charges. The committee sought details on the ways in which the council could incentivise landowners build housing in a timely manner once planning permission had been granted. The Cabinet Member for Planning, Coastal Protection and Flooding noted the national guidance and confirmed that this would be addressed in the revised Island Planning Strategy.

Discussion took place regarding the possibility of the committee receiving monthly finance reporting. The chairman confirmed that he would liaise with the Chief Executive and Cabinet Member to discuss the purpose, practicalities, and resourcing for this request.

RESOLVED:

THAT the report be considered and noted.

10 Members' Question Time

Cllr Joe Robertson asked a question on behalf of IWALC, in relation to any formal partnership arrangements for town, parish and community councils. The Cabinet Member for Planning, Coastal Protection and Flooding provided a verbal response.

Cllr Karl Love asked a question in relation to the financial settlement for the Floating Bridge, and whether the compensation would be used to replace the vessel. It was confirmed that a written response would be provided.

The chairman noted that a series of questions had been submitted to him regarding the School Place Planning report, and it was confirmed that those questions would be forwarded to the Cabinet Member for Children's Services, Education and Lifelong Skills for a response.

CHAIRMAN

Corporate Scrutiny Committee – 6 June 2023**Written question from Oliver Tucker of Ryde to the Corporate Scrutiny Committee**

In point 6 of the school place planning document, we are told that “popular schools remain in full or close to full and this may mean that a large drop in numbers could significantly affect a small number of ‘less popular’ schools. When schools are disproportionately affected by falling rolls, those schools are at risk of spiralling decline. This means that we need to consider removing places.”

How exactly has St Mary’s school been identified by yourselves as less popular and deserving of closure when it has a rising roll and 28 children due to start in September
- Does this not qualify as being ‘close to full’?

Response

Thank you for your recent question submitted to the Corporate Scrutiny Committee about the primary school place planning paper that was due to be discussed at the Isle of Wight Cabinet on Thursday 8 June 2023.

The Isle of Wight Council’s Children’s Services Management Team were asked to draft this paper following a discussion on forecast pupil numbers at the September 2022 Policy and Scrutiny Committee for Children’s Services, Education and Skills.

However, as the Cabinet has decided that the paper will no longer be presented and therefore the recommendations will not be taken forward for public consultation, a response to your questions is no longer appropriate.

It is important to note that the questions submitted are exactly the type of queries we would have been seeking during the consultation, had the decision been made on 8 June for the consultation to begin. It was intended that officers would have attended public meetings to explore these issues in full. After the consultation the views of all those contributing to the debate would have been shared with Cabinet and fully considered before any final proposals were made for further consultation.

It is our experience that such consultations have been meaningful and have often led to better decision making with proposals being refined before further statutory consultation.

Should Cabinet decide to undertake a consultation in the future I would urge you to contribute with queries such as these to the discussions at that time.

Corporate Scrutiny Committee – 6 June 2023

Written question from Rebecca Tucker of Ryde to the Corporate Scrutiny Committee

Following the Equality Act of 2010, the council have a responsibility to “foster good relations between those who share a protected characteristic and those who do not.” How is shutting the only Catholic primary school in Ryde and the surrounding areas fulfilling this obligation?

Response

Thank you for your recent question submitted to the Corporate Scrutiny Committee about the primary school place planning paper that was due to be discussed at the Isle of Wight Cabinet on Thursday 8 June 2023.

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Corporate Scrutiny Committee – 6 June 2023

Written question from Richard Cottell of Ryde to the Corporate Scrutiny Committee

Why were stakeholders (including the diocese, teachers, and parents) in St Mary's Catholic Primary School not informed of a possible closure prior to publication of the story in the local press - Does this not undermine the 10% of funding provided by non-governmental stakeholders (the diocese and parents)?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Jane Berry of Ryde to the Corporate Scrutiny Committee

With climate change so high on the Government's agenda, how can you justify the mileage for Ryde parents wanting a Catholic school who will now need to travel to East Cowes, Totland or Carisbrooke in order for their child/ren to access such an education?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from James Ranson of Ryde to the Corporate Scrutiny Committee

With three housing developments planned for Ryde (Pennyfeathers, Puckpool and West Acre Park), have you considered where incoming families will send their children to school - With parents having the right to choose a faith-based education for their children, how will you ensure that you provide such a choice when you have targeted the one Catholic school in the area for closure?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Vicki Ranson of Ryde to the Corporate Scrutiny Committee

According to the Government's Index of Multiple Deprivation 2019, 3 areas on the Isle of Wight, Ryde North-East, Pan A and B were ranked as among the most deprived in England. There is a strong link between deprivation and low educational attainment. In October 2021, the Isle of Wight Council were questioned over their commitment to tackling island poverty. From my understanding, the IW Council have approved plans to build 474 new houses on the West Acre site, which neighbours this deprivation area. The IW Council have approved closure of a local dairy farm, kept the local water park shut from the community and now threatened closure of a School.

With the announcements of the potential closure of St Mary's a well-attended, community focused school, how does the IW Council expect to support families and their children in breaking the cycle of deprivation?

Response

Thank you for your recent question submitted to the Corporate Scrutiny Committee about the primary school place planning paper that was due to be discussed at the Isle of Wight Cabinet on Thursday 8 June 2023.

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Corporate Scrutiny Committee – 6 June 2023

Written question from Cathryn Grosvenor of Wootton to the Corporate Scrutiny Committee

If you were to close and sell the St Mary's site (remembering that the diocese and parents have been responsible for 10% of the school's funding), then housing would be a seemingly obvious use for the land. Have you considered where incoming families will send their children to school, with parents having the right to choose a faith-based education for their children, how will you ensure that you provide such a choice when you have targeted the one Catholic school in the area for closure?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Lora Coombes of Ryde to the Corporate Scrutiny Committee

Have you considered whether there are enough spaces at the three remaining Catholic primary schools for all of the families at St Mary's Catholic Primary School, as these families have all chosen a Catholic education for their children, should they not be provided with a like-for-like alternative if they are suddenly told that their chosen school must close - is any less not discrimination against Catholic education, particularly as alternative Catholic provisions are outside of the five-mile proximity promised to parents for school re-allocation?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Simon Coombes of Ryde to the Corporate Scrutiny Committee

In St Mary Primary School's most recent OSTED report, it was said that "*the newly appointed senior leaders have a clear vision for the school. They understand the strengths of the school and are taking effective action to improve outcomes for pupils*". This is after they had been in post for less than a term. In your press release, Councillor Debbie Andre talks of "providing excellent education for our children." How then has the council selected St Mary's as a candidate for possible closure, a school that is on such a strong upward trajectory, led by "effective leaders" with a "clear vision"?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Michael Christopher of Ryde to the Corporate Scrutiny Committee

Do the Council plan to build a new school in the Ryde area within the next 5 years as the huge increase in housing proposal would leave nowhere for incoming families to send their children to school?

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Helen Smallwood of Ryde to the Corporate Scrutiny Committee

In point 48 of the school place planning document, it is predicted that Ryde rural schools will have 36.2% of surplus places by September 2024. This is in contrast to 26.8% of surplus places in Ryde itself. Why take such radical steps as to close a school in Ryde Town when the projection for Ryde Rural is considerably worse in the longer term?

Response

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Should Cabinet decide to undertake a consultation in the future I would urge you to contribute with queries such as these to the discussions at that time.

Corporate Scrutiny Committee – 6 June 2023

Written question from Lizzie Christopher of Ryde to the Corporate Scrutiny Committee

The announcement of the potential closure of St Mary's Catholic primary school in the local press, prior to any consultation with the community, has now unduly influenced the public opinion that it is a failing school - which is untrue. How can the IW Council justify its conduct in this particular situation, considering this bias approach?

Response

Thank you for your recent question submitted to the Corporate Scrutiny Committee about the primary school place planning paper that was due to be discussed at the Isle of Wight Cabinet on Thursday 8 June 2023.

The Isle of Wight Council's Children's Services Management Team were asked to draft this paper following a discussion on forecast pupil numbers at the September 2022 Policy and Scrutiny Committee for Children's Services, Education and Skills.

However, as the Cabinet has decided that the paper will no longer be presented and therefore the recommendations will not be taken forward for public consultation, a response to your questions is no longer appropriate.

It is important to note that the questions submitted are exactly the type of queries we would have been seeking during the consultation, had the decision been made on 8 June for the consultation to begin. It was intended that officers would have attended public meetings to explore these issues in full. After the consultation the views of all those contributing to the debate would have been shared with Cabinet and fully considered before any final proposals were made for further consultation.

It is our experience that such consultations have been meaningful and have often led to better decision making with proposals being refined before further statutory consultation.

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Corporate Scrutiny Committee – 6 June 2023

Written question from Roisin Mullins-Jacobs of Ryde to the Corporate Scrutiny Committee

Was standard procedure followed? A lack of investigation/ planning preceded a half term press release on the closure of St. Mary's VA (Ofsted 'Requires Improvement', no closure criteria met), Roman Catholic (19% of UK and separate to CofE), Primary and Preschool, of 212 pupils, (SEN provision), before informing parents and full staff. Possibilities were disregarded; intake reduction, Academy status, relocation or rebuild of fully used site, within the Island's largest town, with the next RC alternative 8.6 miles away, close to developments Puckpool, West Acre Park, and Pennyfeathers, with a rising population and traffic. The faith school had 28/30 places, for Reception 2023, these actions caused distress, and damage to the popular school's reputation (online petition over 1,000) and stability, following return from Covid restrictions / baby boom. This action benefited unpopular / smaller Island schools, as a lack of available Ryde places exist to accommodate siblings and years.

Response

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However, as the Cabinet has decided that the paper will no longer be presented and therefore the recommendations will not be taken forward for public consultation, a response to your questions is no longer appropriate.

It is important to note that the questions submitted are exactly the type of queries we would have been seeking during the consultation, had the decision been made on 8 June for the consultation to begin. It was intended that officers would have attended public meetings to explore these issues in full. After the consultation the views of all those contributing to the debate would have been shared with Cabinet and fully considered before any final proposals were made for further consultation.

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Corporate Scrutiny Committee – 6 June 2023

Written question from Jack Jacobs of Ryde to the Corporate Scrutiny Committee

Article 9 of the UN declaration of Human Rights continues to protect our absolute right to practice our religious beliefs without hindrance, whilst Religion and Belief are protected characteristics under Equality Act 2010. The Council is threatening to remove the ability of parents to educate their children within the Roman Catholic faith, by closing St. Mary's Catholic School, Ryde, with no equivalent Roman Catholic schools offered within reasonable distances. Whether intended or not, discriminating solely against Catholic pupils by removing their legal right to follow their belief, when non-discriminatory options were available, represents an intolerable and unlawful interference by the state, particularly when St. Mary's does not meet any of the criteria for closure. What measures is the Council taking to ensure that these rights are not breached for the hundreds of pupils and parents at St. Mary's Catholic School?

Response

Thank you for your recent question submitted to the Corporate Scrutiny Committee about the primary school place planning paper that was due to be discussed at the Isle of Wight Cabinet on Thursday 8 June 2023.

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Corporate Scrutiny Committee – 6 June 2023

Written question from Sarah Cottell of Ryde to the Corporate Scrutiny Committee

Why has St Mary's chosen to possibly be closed, considering its advantages below?

- A high intake, 29 in Preschool, 28 due to start Sept 2023
- The building is suitable to accommodate all children in separate classes
- The grounds and surrounding woodland to provide outside learning through forest school and other outside activities, reception/ preschool also have their own separate outdoor playground/ learning areas.
- Appropriate staffing levels and teaching assistants and can offer SEND provisions
- Breakfast club/after school clubs, enabling parents to work
- It is in walking distance for the majority of pupils, myself included, who with 4 children ages 7 and under, and a non-driver, would struggle to get much further
- Is the only Catholic school in Ryde and enables the opportunity for religious learning and expression
- Ofsted report requires improvement, which isn't low, new leadership can provide improvement as we have already seen.

Response

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Corporate Scrutiny Committee – 6 June 2023

Written question from Vicki Humm to the Corporate Scrutiny Committee

Given all of the planning proposals for new housing in Ryde, do you think that you will be forced to build a new school further down the line, is it not short-sighted to close a Ryde school with this in mind?

Response

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However, as the Cabinet has decided that the paper will no longer be presented and therefore the recommendations will not be taken forward for public consultation, a response to your questions is no longer appropriate.

It is important to note that the questions submitted are exactly the type of queries we would have been seeking during the consultation, had the decision been made on 8 June for the consultation to begin. It was intended that officers would have attended public meetings to explore these issues in full. After the consultation the views of all those contributing to the debate would have been shared with Cabinet and fully considered before any final proposals were made for further consultation.

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Should Cabinet decide to undertake a consultation in the future I would urge you to contribute with queries such as these to the discussions at that time.

Corporate Scrutiny Committee – 6 June 2023

Written question from Antonio Entrena Urquia to the Corporate Scrutiny Committee

Why was the information released to the press before consultation with teachers and parents, has this information not created a bias and predetermined opinion of St Mary's reputation as a school?

Response

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The Isle of Wight Council's Children's Services Management Team were asked to draft this paper following a discussion on forecast pupil numbers at the September 2022 Policy and Scrutiny Committee for Children's Services, Education and Skills.

However, as the Cabinet has decided that the paper will no longer be presented and therefore the recommendations will not be taken forward for public consultation, a response to your questions is no longer appropriate.

It is important to note that the questions submitted are exactly the type of queries we would have been seeking during the consultation, had the decision been made on 8 June for the consultation to begin. It was intended that officers would have attended public meetings to explore these issues in full. After the consultation the views of all those contributing to the debate would have been shared with Cabinet and fully considered before any final proposals were made for further consultation.

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Should Cabinet decide to undertake a consultation in the future I would urge you to contribute with queries such as these to the discussions at that time.

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Corporate Scrutiny Committee - Progress on Actions & Outcomes

Meeting Date	Agreed Action	Responsibility	Update	Actioned
Outstanding Actions				
10 January 2023	Forward Plan The committee requested a copy of the review of leisure centres once it has been completed.	Cabinet Member for Economy, Regeneration, Culture and Leisure	Update from 9 May meeting: Currently still in the process of gathering data - anticipate the review being ready autumn time ahead of budget discussions for 2024-25	
7 February 2023 Page 27	Asset Management/ Property Rationalisation The heads of agreement in relation to the proposed disposal of Kingston Marine Park be circulated to the committee once they are signed.	Cabinet Member for Economy, Regeneration, Culture and Leisure	Nothing received as yet	
	Cowes Floating Bridge The committee to determine the scope of the request to view the confidential delegated decision with the reasons for this and the outcome being sought together with the Councillors wishing to view the papers.	Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health, and Homelessness	6 June - The Deputy Leader confirmed that a written response would be provided in regards to the formal request made by members of the committee in March 2023 to view the confidential Floating Bridge settlement.	
9 May 2023	IW Community Safety Partnership Annual Report 2021-22 Request was made to scope the topic of Perpetrator Programmes	Scrutiny Officer	Item is awaiting approval to be added to the workplan.	
6 June 2023	Forward Plan The Strategic Manager for Housing to deliver a presentation to all councillors (to include details on affordable purchase, affordable rental, leasing, and mobile homes) in order for the scope of any potential task and finish group to be established.	Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health, and Homelessness	Discussions are being progressed to set a date and the make the necessary arrangements for the event	

	Members Questions Cllr Love raised a question in relation to the financial settlement for the Floating Bridge, and whether the compensation would be used to replace the vessel. It was confirmed that a written response would be provided.	Cabinet Member for Highway PFI, Transport and Infrastructure	No response received as yet	
Actions Completed (Since Last Meeting)				
10 January 2023	Call In The Chairman of the Corporate Scrutiny committee requested the Monitoring Officer determine a suitable solution to help make Councillors aware of delegated decisions and therefore make the call in process easier.	Monitoring Officer	Members were advised that Mod.gov sends out notifications for officer delegated and cabinet member decisions (as per the constitution) to all members, not just committee members. As part of the constitution review the call-in process for scrutiny will be reviewed and will be put forward to the committee when appropriate	Jun-23
June 2023 Page 28	QMPR Q4 A detailed written response would be provided and circulated to the committee regarding the questions raised on the housing register, particularly in relation to the number of homeless individuals or those living in temporary accommodation.	Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health, and Homelessness	An answer has been circulated to the committee	Jun-23
	QMPR Q4 The chairman to liaise with the Chief Executive and Cabinet Member for Finance, Climate Change, and Biosphere to discuss the purpose, practicalities, and resourcing of the committee receiving monthly finance reporting.	The Chairman of the Committee	The Chairman spoke with the Chief Executive and Cabinet member and determined that quarterly reporting, along with the rest of the Council's departments, remains the best approach for finance reporting at this time.	Jun-23

Isle of Wight Council Forward Plan – June 2023 – Version 3 and (where relevant) Notice of Intention to Hold Part of Meeting in Private Session

The Forward Plan is a list of all matters that are due to be considered no earlier than 28 clear working days from the date of this notice by the appropriate Decision Making Body or individual including those deemed to be key decisions.

The plan also gives notice of which decisions (if any) that may be made in private with the exclusion of press and public where for example personal or commercially sensitive information is to be considered in accordance with the Local Authorities (Executive Arrangements)(Meetings and Access to Information(England) Regulations 2012.

A list of all Council Members can be found on the Council’s web site from this link

The Leader of the Council (also responsible for Strategic Oversight) is Cllr Lora Peacey-Wilcox.

Other members of the Cabinet are:

Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health and Homelessness - Cllr Ian Stephens

Cabinet Member for Transport and Infrastructure, Highways PFI and Transport Strategy - Cllr Phil Jordan

Cabinet Member for Children's Services, Education and Lifelong Skills - Cllr Debbie Andre

Cabinet Member for Economy, Regeneration, Culture and Leisure - Cllr Julie Jones-Evans

Cabinet Member for Planning, Coastal Protection and Flooding - Cllr Paul Fuller

Cabinet Member for Finance, Climate Change and Biosphere - Cllr Jonathan Bacon

Cabinet Member for Regulatory Services, Community Protection, Waste and ICT – Cllr Karen Lucioni

* Please note that any items highlighted in yellow are changes or additions from the previous Forward Plan

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
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Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>Island Planning Strategy</p> <p>As the Draft IPS was not agreed on 5 October, Full Council is to specify its objections and to formally refer the matter back to the Cabinet.</p>	<p>Full Council</p> <p>Date 1st added: 17 March 2022</p>	<p>17 May 2023 DEFERRED</p>		<p>Internal and External Full public consultation</p>	<p>Open</p>
<p>QPMR Q4 - 2022-23</p> <p>To provide a summary of progress against Corporate Plan activities and measures for the period January 2022 to March 2023. To inform Cabinet of areas of particular success, issues requiring attention and remedial activity in place to deal with these. To provide a report on the financial position of the council for the same period</p>	<p>Cabinet</p> <p>Cabinet Member for Strategic Finance, Transformational Change and Corporate Resources (Archived 19 May 2023) Date 1st added: 1 February 2023</p>	<p>8 Jun 2023</p>			<p>Open</p>
<p>Concessionary Travel Reimbursement April 2023 to March 2024</p> <p>To seek approval to update the Council's approach to concessionary fare reimbursement for local bus operators from 1 April 2022 until 31 March 2023 in line following preparatory negotiations and revised guidance from the Department for Transport (DfT).</p>	<p>Cabinet</p> <p>Cabinet Member for Infrastructure, Highways PFI and Transport (Archived 19 May 2023) Date 1st added: 6 April 2023</p>	<p>8 Jun 2023</p>			<p>Open</p>

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>Isle of Wight Cultural Strategy</p> <p>Adoption of a new Cultural strategy for the Island developed in partnership with the Island collection after extensive consultation with relevant stakeholders</p>	<p>Cabinet</p> <p>Cabinet Member for Levelling Up, Regeneration, Business Development and Tourism (archived 19 May 2023) Date 1st added: 1 February 2023</p>	<p>8 Jun 2023</p>		<p>Island wide consultation to develop strategy underway – on publication of draft , Policy/scrutiny, relevant cabinet members</p>	<p>Open</p>
<p>Isle of Wight Level 3 Integrated Sexual Health Service Procurement</p> <p>To approve the procurement of the Level 3 (L3) Integrated Sexual Health Service for the Isle of Wight. The L3 Sexual Health Service for Isle of Wight residents provided by Solent NHS Trust will formally end on the 31st April 2024. The proposal is to collaboratively commission a new service for Isle of Wight residents through open competition with system partners, Hampshire CC, Portsmouth CC, Southampton CC, NHS Hampshire and IOW ICB, NHS Frimley ICB and NHSE.</p>	<p>Cabinet</p> <p>Cabinet Member for Adult Social Care, Public Health (archived 19 May 2023) Date 1st added: 14 March 2023</p>	<p>8 Jun 2023</p>		<p>Engagement with partners</p>	<p>Open</p>

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>Adoption of the Newport & Ryde LCWIP as a Supplementary Planning Document (SPD)</p> <p>Following a period of public consultation, Cabinet to be asked to adopt the Newport & Ryde Local Cycling and Walking Infrastructure Plan (LCWIP) as a Supplementary Planning Document (SPD) that post adoption can be used as a material consideration in planning decisions.</p>	<p>Cabinet</p> <p>Cabinet Member for Levelling Up, Regeneration, Business Development and Tourism (archived 19 May 2023) Date 1st added: 1 March 2023</p>	<p>8 Jun 2023</p>		<p>Prior to the cabinet decision, a formal 6 week public consultation in the LCWIP will have taken place in line with Planning legislation for the adoption of SPDs, including consultation with a number of statutory consultees</p>	<p>Open</p>
<p>Acquisition Strategy</p> <p>Approval of a strategy that enables the council to purchase properties for letting.</p>	<p>Cabinet</p> <p>Deputy Leader, Cabinet Member for Digital Transformation, Housing, Homelessness and Poverty (Archived 19 May 2023) Date 1st added: 6 April 2023</p>	<p>13 Jul 2023</p>		<p>Internal Council Services</p>	<p>Open</p>
<p>Newport High Street Traffic Regulation Proposals</p> <p>Proposed revisions to parking and loading restrictions on Newport High Street to enable improvements to the pedestrian environment and street scene to be made as part of the Newport Heritage Action Zone.</p>	<p>Cabinet</p> <p>Cabinet Member for Infrastructure, Highways PFI and Transport (Archived 19 May 2023) Date 1st added: 3 May 2023</p>	<p>13 Jul 2023</p>		<p>Formal 28-day public consultation.</p>	<p>Open</p>

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>Empty Property Strategy</p> <p>Approval of a strategy that sets out the approach to dealing with empty properties</p>	<p>Cabinet</p> <p>Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health and Homelessness Date 1st added: 5 June 2023</p>	<p>13 Jul 2023</p>		<p>Internal Council Services</p>	<p>Open</p>
<p>Amalgamation of Chillerton & Rookley Primary School with Godshill Primary School</p> <p>The amalgamation of Chillerton & Rookley Primary School with Godshill Primary School through the closure of Chillerton & Rookley Primary School.</p>	<p>Cabinet</p> <p>Cabinet Member for Children's Services, Education and Lifelong Skills Date 1st added: 9 June 2023</p>	<p>13 Jul 2023</p>		<p>Consultation undertaken previously</p>	<p>Open</p>
<p>Disposal of potential housing site(s) in East Cowes</p> <p>To confirm the granting of an option to dispose , subject to securing planning permission, on one or both of the council owned development sites known as Maresfield Rd and Albany</p>	<p>Cabinet</p> <p>Cabinet Member for Levelling Up, Regeneration, Business Development and Tourism (archived 19 May 2023) Date 1st added: 6 July 2022</p>	<p>14 Sep 2023</p>		<p>East Cowes Waterfront Implementation Group and local member</p>	<p>Part exempt Yes – appendix summarising appraisal of responses to EOI issued in April 2022 – responses were submitted as commercial in confidence</p>

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>Adoption of three LCWIPs (East Cowes & Whippingham; Cowes, Gurnard & Northwood; Brading, Bembridge & St Helens) as a Supplementary Planning Documents (SPD)</p> <p>Following a period of public consultation, Cabinet to be asked to adopt three separate Local Cycling and Walking Infrastructure Plans (LCWIP) for East Cowes & Whippingham; Cowes, Gurnard & Northwood; and Brading, Bembridge & St Helens as Supplementary Planning Documents (SPD) that post adoption can be used as a material consideration in planning decisions.</p>	<p>Cabinet</p> <p>Cabinet Member for Levelling Up, Regeneration, Business Development and Tourism (archived 19 May 2023) Date 1st added: 1 March 2023</p>	<p>14 Sep 2023</p>		<p>Prior to the cabinet decision, a formal 6 week public consultation in the LCWIPs will have taken place in line with Planning legislation for the adoption of SPDs, including consultation with a number of statutory consultees</p>	<p>Open</p>
<p>Adoption of EV Chargepoint Infrastructure Strategy</p> <p>Following a period of public consultation, an Electric Vehicle Charging Infrastructure Strategy has been developed. This provides detail on the roll out of public chargepoints and associated policies to ensure that a lack of charging infrastructure does not act as a barrier to electric vehicle ownership.</p>	<p>Cabinet</p> <p>Cabinet Member for Infrastructure, Highways PFI and Transport (Archived 19 May 2023) Date 1st added: 2 May 2023</p>	<p>14 Sep 2023</p>		<ol style="list-style-type: none"> 1. Public – via public consultation 2. Stakeholders – via public consultation 3. Town, Parish or Community Councils – via webinars 4. Internal Council Services – direct contact on technical issues 	<p>Open</p>

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>QPMR Q1 - 2023-24</p> <p>To provide a summary of progress against Corporate Plan activities and measures for the period January 2022 to March 2023. To inform Cabinet of areas of particular success, issues requiring attention and remedial activity in place to deal with these. To provide a report on the financial position of the council for the same period</p>	<p>Cabinet</p> <p>Cabinet Member for Finance, Climate Change and Biosphere Date 1st added: 31 May 2023</p>	<p>14 Sep 2023</p>			<p>Open</p>
<p>Local Bus Service Enhanced Partnership Plan and Scheme</p> <p>To seek approval for the proposed Local Bus Service Enhanced Partnership Plan and Scheme with Southern Vectis, based on the recently adopted Bus Services Improvement Plan.</p>	<p>Cabinet</p> <p>Cabinet Member for Transport and Infrastructure, Highways PFI and Transport Strategy Date 1st added: 5 June 2023</p>	<p>14 Sep 2023</p>		<p>N/A</p>	<p>Open</p>

Title and Summary of Proposed Decision	Decision Making Body and name of relevant Cabinet Member	Meeting Date/Proposed Publishing Date	Relevant documents submitted to decision maker to be considered*	Consultees (including town and parish councils) and Consultation Method	May report or part of report be dealt with in private? If so - why?
<p>Housing Affordability Supplementary Planning Document (SPD)</p> <p>Seeking formal adoption of the 'Housing Affordability Supplementary Planning Document (SPD)' following a period of public consultation that will take place in June/July 2023. The principle of preparing and adopting a Housing Affordability SPD was agreed at the Housing Members Board in April 2023.</p>	<p>Cabinet</p> <p>Cabinet Member for Planning, Coastal Protection and Flooding Date 1st added: 5 June 2023</p>	<p>14 Sep 2023</p>		<p>Statutory consultation to be undertaken in line with planning legislation for 6 week period to include key stakeholders and the public with targeted consultation to RSLs and developers providing affordable housing.</p>	<p>Open</p>
<p>The adoption of the Newport Harbour Masterplan Supplementary Planning Document</p> <p>Whether to adopt the draft Newport Harbour Masterplan as a supplementary planning document</p>	<p>Cabinet</p> <p>Cabinet Member for Levelling Up, Regeneration, Business Development and Tourism (archived 19 May 2023) Date 1st added: 7 September 2022</p>	<p>12 Oct 2023</p>			<p>Open</p>

Corporate Scrutiny Committee - Workplan 2022-25

The committee is responsible for Scrutiny functions in respect of decisions and activities within the remit of the council, the Cabinet, Cabinet members, officers, and any functions not otherwise expressly delegated to another Scrutiny committee

Date	Agenda Items	Description & Background	Lead Officer/Cabinet Member
11 July 2023	Pre-Decision Scrutiny - Amalgamation of Chillerton & Rookley Primary School with Godshill Primary School	To consider the proposal for the amalgamation of Chillerton & Rookley Primary School with Godshill Primary School through the closure of Chillerton & Rookley Primary School ahead of Cabinet on 13 July.	Cabinet Member for Children's Services, Education and Lifelong Skills
	Pre-Decision Scrutiny - Empty Property Strategy	To consider the strategy that sets out the approach to dealing with empty properties ahead of going to Cabinet on 13 July.	Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health and Homelessness
	Pre-Decisions Scrutiny - Acquisition Strategy	To consider a briefing note from the Policy and Scrutiny Committee for Neighbourhoods and Regeneration following discussion of the item at the 6 July 2023 committee meeting.	Deputy Leader and Cabinet Member for Adult Services and Housing, Public Health and Homelessness
	Capital Programme/ Capital Strategy	To consider a report on the lines of enquiry agreed by the Committee at its meeting on 10 May 2022	Cabinet Member for Finance, Climate Change, and Biosphere
	Performance Management Framework	To consider a report on the lines of enquiry agreed by the Committee at its meeting on 11 October 2022.	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee

6 September 2023 - INFORMAL	Cyber Security	To receive a response and discussion on the questions posed before considering what further actions require the attention of the committee	Cabinet Member for Regulatory Services, Community Protection, Waste and ICT Director of Corporate Services
12 September 2023	Carbon Offsetting	To consider the councils approach to carbon offsetting.	Cabinet Member for Finance, Climate Change, and Biosphere
	Quarterly Performance Monitoring Report Quarter 1 2023-24	To consider the performance measures for Quarter 1 2023-24	Cabinet Member for Finance, Climate Change, and Biosphere
	Corporate Complaints Annual Report 2022-23	To consider the annual complaints report to ensure that this is helping to drive service improvement through lessons learnt.	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
10 October 2023	Pre Decision Scrutiny - The adoption of the Newport Harbour Masterplan Supplementary Planning Document	To consider the draft Newport Harbour Masterplan as a supplementary planning document prior to decision at Cabinet	Cabinet Member for Economy, Regeneration, Culture and Leisure
	Pre Decision Scrutiny - Disposal of potential housing site(s) in East Cowes	To consider the option to dispose, subject to securing planning permission, on one or both of the council owned development sites known as Maresfield Rd and Albany	Cabinet Member for Economy, Regeneration, Culture and Leisure
	Scams and Fraud Prevention	To consider the councils approach and partnership working in regard to scam and fraud prevention.	Cabinet Member for Regulatory Services, Community Protection, Waste and ICT
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee

7 November 2023	IW Community Safety Partnership Annual Report 2022-23	To consider the annual report of the partnership in accordance with the Committee's statutory function to review or scrutinise decisions made, or other action taken, in connection with the discharge by the responsible authorities of their crime and disorder functions.	Cabinet Member for Regulatory Services, Community Protection, Waste and ICT
	Quarterly Performance Monitoring Report Quarter 2 2023-24	To consider the performance measures for Quarter 2 2023-24	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
9 January 2024	Draft budget proposals 2024- 25	To comment on outline budget proposals.	Leader / Cabinet Members / Section 151 Officer
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
6 February 2024	Budget proposals for 2024-25	To comment on draft budget proposals	Leader / Cabinet Members / Section 151 Officer
	Quarterly Performance Monitoring Report Quarter 3 2023-24	To consider the performance measures for Quarter 3 2023-24	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
12 March 2024	Scrutiny Annual Report	To review the work of Scrutiny and make recommendations for improvements where appropriate.	Chairman of the Corporate Scrutiny Committee / Scrutiny Officer

	Policy Framework Annual Review	To review the Council's list of policies to ensure that they are being reviewed and refreshed timely and effectively.	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
7 May 2024			
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
June 2024	Quarterly Performance Monitoring Report Quarter 4 2023-24	To consider the performance measures for Quarter 4 2023-24	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
July 2024			
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
September 2024	Corporate Complaints Annual Report 2023-24	To consider the annual complaints report to ensure that this is helping to drive service improvement through lessons learnt.	Cabinet Member for Finance, Climate Change, and Biosphere

	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
October 2024			
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
November 2024	IW Community Safety Partnership Annual Report 2023-24	To consider the annual report of the partnership in accordance with the Committee's statutory function to review or scrutinise decisions made, or other action taken, in connection with the discharge by the responsible authorities of their crime and disorder functions.	Cabinet Member for Regulatory Services, Community Protection, Waste and ICT
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
January 2025	Draft budget proposals 2025-26	To comment on outline budget proposals.	Leader / Cabinet Members / Section 151 Officer
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
February 2025	Draft budget proposals 2025-26	To comment on draft budget proposals	Leader / Cabinet Members / Section 151 Officer

	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee
March 2025	Scrutiny Annual Report	To review the work of Scrutiny and make recommendations for improvements where appropriate.	Chairman of the Corporate Scrutiny Committee / Scrutiny Officer
	Policy Framework Annual Review	To review the Council's list of policies to ensure that they are being reviewed and refreshed timely and effectively.	Cabinet Member for Finance, Climate Change, and Biosphere
	Committee's Workplan	a) Forward Plan To identify any items due to be determined that would benefit from pre- or post-decision scrutiny. b) Committee's Work Programme 2022-25	Committee

Appendix 1

CORPORATE SCRUTINY COMMITTEE - WORKPLAN SCOPING DOCUMENT

TOPIC	Domestic Violence – Perpetrator Programmes
PROPOSED COMMITTEE DATE	7 November 2023
BACKGROUND	<p>At the 9 May 2023 Corporate Scrutiny, the committee received the IW Community Safety Partnership Annual Report 2022-22. During discussions the committee requested a more detailed item on Perpetrator Programmes be brought to a future committee meeting.</p> <p>Domestic violence perpetrator programmes are aimed at reducing the incidence of domestic violence by changing the attitudes, behaviours, and beliefs of perpetrators.</p>
FOCUS FOR SCRUTINY	<ul style="list-style-type: none"> • What are the statistics behind perpetrator programmes nationally and on the Isle of Wight? • What are the pathways for female, male, non-binary and transgender victims of domestic abuse and do they differ? • What is being done to reverse the trend of the perpetrator of domestic abuse remaining in the home, while the victim must leave? • What are the pathways to safeguard the island population? • What work is being done within schools to raise awareness? • What work is being done to increase community engagement and awareness? • What work is being done to ensure joined up working with health partners? • Are there “Safe Spaces” on the island and are these distributed where the need is?
EXPECTED BENEFITS/ OUTCOMES	<ul style="list-style-type: none"> • The committee to gain an understanding of what work is ongoing to reduce perpetrators reoffending. • The committee to make any recommendation or suggestions for improvement.
APPROACH	Committee Report
WITNESSES/ EVIDENCE REQUIRED	<p>Representative from Southern Domestic Abuse Partnership or Isle of Wight domestic Abuse Board?</p> <p>Cabinet Member for Community Protection, Regulatory Services and Waste Strategic Manager for Regulatory and Community Safety Services</p>
LINKS TO CORPORATE PLAN	<p>Core values Our purpose is to work with and support the Island’s community, finding ways to help it to satisfy its needs independently or to provide services directly where necessary. We value:</p> <p>1. Being community focused: This means, wherever possible, putting the needs of our residents first.</p> <p>2. Working together: This means engaging realistically with partners to make the most of integrated working, helping communities to help themselves and being a strong council team that delivers on these values.</p>

3. Being effective and efficient

This means being the best that we can be in how we organise and deliver our services, using all our limited resources wisely and carefully, getting on with things where we can.

4. Being fair and transparent

This means making decisions based on data and evidence and in an open and accountable way.



Agenda Item Introduction

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Topic	PRE-DECISION SCRUTINY - AMALGAMATION OF CHILLERTON & ROOKLEY PRIMARY SCHOOL WITH GODSHILL PRIMARY SCHOOL

BACKGROUND

At the Policy and Scrutiny Committee for Children's Services, Education and Skills on 1 September 2022, representatives from headteachers and school governors made a submission that highlighted the issue of school place planning, its impact upon the education of children and over-sufficiency of primary school places.

It was resolved that the Cabinet Member for Children's Services, Education and Skills be requested to submit a report on school place planning, together with the statements from Isle of Wight Primary Headteachers and Primary Chairs of Governors, to Cabinet for consideration and identification of options regarding the future provision of primary education on the Island.

A paper was due to go to Corporate Scrutiny and Cabinet in June 2023 but was revoked ahead of the meetings. A new item was added to the Council's Forward Plan that focuses solely on the proposed amalgamation of Chillerton & Rookley Primary School with Godshill Primary School. The committee will review the paper ahead of it going to Cabinet on 13 July 2023.

FOCUS FOR SCRUTINY

The role of the committee is not to act as a 'shadow Cabinet'. Its function is to ensure that the principles of decision making have been complied with:

- taking into account all relevant considerations and ignoring those which are irrelevant
- compliance with finance, contract and all other procedure rules
- due consultation and proper advice is taken, and alternative options considered before decisions are reached
- impartiality and an absence of bias or pre-determination
- any interests are properly declared
- decisions are properly recorded and published
- decisions are proportionate to the desired outcome
- respect for human rights and equality impacts
- a presumption in favour of transparency and openness
- clarity of aims and desired outcomes
- due consideration of all available options
- reasons are given for decisions

OUTCOME

Does the committee support the proposed recommendations, or wish to report any comment to Cabinet?

APPROACH

The Cabinet report to be submitted to the committee.

DOCUMENTS ATTACHED

Report to Cabinet on 13 July 2023 – Amalgamation of Chillerton and Rookley Primary School with Godshill Primary School

Contact Point: Melanie White, Scrutiny Officer, ☎ 821000 ext 8876
e-mail melanie.white@iow.gov.uk



Cabinet Report

Date	13 JULY 2023
Title	AMALGAMATION OF CHILLERTON AND ROOKLEY PRIMARY SCHOOL WITH GODSHILL PRIMARY SCHOOL
Report of	CABINET MEMBER FOR CHILDRENS SERVICES, EDUCATION AND LIFELONG SKILLS

EXECUTIVE SUMMARY

1. The Stenbury Federation (the Governing Body for Chillerton and Rookley and Godshill Primary Schools) wrote to the Isle of Wight Council on 19 January 2021 requesting that an amalgamation of Chillerton and Rookley and Godshill Primary Schools be consulted upon. An initial public consultation commenced on the 29 January 2021 and concluded on the 19 March 2021.
2. Cabinet took the decision to undertake a further period of consultation on a range of options and this period of consultation commenced on the 5 November and concluded on the 17 December 2021.
3. Cabinet reviewed the outcome of this consultation on the 10 February 2022 and took the decision to defer the decision pending a further review into options other than closure.
4. Further options have been considered, but due to continuing very low numbers on roll at the school, only 9 children, and governors being unable to recruit to a vacant teaching post the decision was taken by the Governing Body, supported by the IoW Council and in discussion with the impacted families to educate all children across the Federation on the Godshill Primary School site from 1 January 2023.
5. This report sets out the recommendations on next steps and associated timeframe.

RECOMMENDATION

That Cabinet approves the publication of a Public Notice that achieves the amalgamation of Godshill Primary School and Chillerton and Rookley Primary School through the closure of Chillerton & Rookley Primary School with effect from the 31 December 2023.

BACKGROUND

6. The Council received a letter from the Stenbury Federation (the Governing Body for Chillerton and Rookley and Godshill Primary Schools) on 19 January 2021 requesting that an amalgamation of Chillerton and Rookley and Godshill Primary Schools be consulted upon. On 22 January 2021, an officer delegated decision was taken to approve a pre-publication consultation on the future of Chillerton and Rookley Primary School, part of the Stenbury Federation with Godshill Primary School.
7. A pre-publication consultation commenced on 29 January 2021 and ran until 19 March 2021. It was informed by a number of issues that the governors explained are compromising the viability and educational provision at Chillerton and Rookley Primary school.
8. The consultation was an on-line consultation with no public meetings able to be held due to the coronavirus pandemic. People consulted included the parents of the pupils attending Chillerton and Rookley and Godshill Primary Schools, the Member of Parliament, Parish Councils, local councillors, Trade Unions, and residents. In total 110 responses were received from different sources with some people making more than one response.
9. Following a change in the Council's political administration after the local government elections in May 2021 the new administration took a decision to undertake a further period of public consultation that included a range of alternative options. This was to provide an opportunity for all stakeholders to comment on a broad range of options and bring forward alternate proposals should they wish.
10. This second period of consultation commenced on 5 November 2021 and ran until 17 December 2021.
11. An on-line consultation and two public meetings were held, one at Chillerton and Rookley and one at Godshill Primary School. People and groups consulted included the parents of the pupils attending Chillerton and Rookley and Godshill Primary School, the Member of Parliament, Parish Councils, local councillors, Trade Unions, and residents. In total 233 responses were received from different sources with some people making more than one response.
12. In February 2022, Cabinet took the decision to defer the decision to proceed with the publication of a Public Notice to achieve the proposed amalgamation of Godshill Primary School and Chillerton and Rookley Primary School through the closure of Chillerton & Rookley Primary School with effect from the 31 August 2022, in order for further options to be explored.
13. Further options were considered as requested by Cabinet, but with a sustained decline in children attending the school, and the governors being unable to appoint a teacher to work at the school, Cabinet should now reconsider the school's future.
14. The number of children attending the school has fallen steadily over the last few years, with 9 on roll as of June 2023. The school has a capacity of 91 places. This contrasts with 85 pupils on roll in the 2017/18 academic year. Of the 9 pupils on roll only 2 pupils live in Chillerton, and 3 in Rookley. The school has a Published Admission Number (PAN) of 13.

15. From the 1 January 2023 all the children on roll at Chillerton & Rookley, in agreement with their parents have been taught at the Godshill site. This has ensured they have access to the full primary curriculum, participate in extra-curricular activities and develop wider social and emotional skills with their peer groups.
16. Schools are mainly funded based upon the number of pupils on roll. Low and falling pupil numbers has a significant impact on a school's budget.
17. It is recommended that Cabinet approve the publication of the Public Notice to achieve the proposed amalgamation of Godshill Primary School and Chillerton and Rookley Primary School through the closure of Chillerton & Rookley Primary School with effect from the 1 January 2024.

CORPORATE PRIORITIES AND STRATEGIC CONTEXT

18. The recommendation in this report directly links to the Corporate Plan 2021-25 priority which is to work with local communities to maintain and ensure appropriate local school provision. In addition to this it supports the commitment that through ongoing business of the council we will work with and challenge schools' performance to ensure that all are good or outstanding, and to ensure work is undertaken to challenge schools in financial deficit to secure a more sustainable position for the schools and the council.

Responding to climate change and enhancing the biosphere

19. Godshill Primary School is a more energy efficient building than Chillerton & Rookley Primary School.
20. Subject to the availability of funding heat decarbonisation plans will be commissioned in the near future for all Local Authority owned school buildings. The recommendation in this report will assist in the submission of applications for future funding and ultimately support the IWCs target to be carbon neutral by 2035.

Economic Recovery and Reducing Poverty

21. As set out within the corporate plan this report demonstrates the council's commitment to work with local communities to maintain and ensure appropriate local school provision, providing the best possible outcomes for children on the Island. In addition to this it supports the commitment that through the ongoing business of the council it will work with and challenge schools' performance to ensure that all are good or outstanding, and to ensure work is undertaken to challenge schools in financial deficit to secure a more sustainable position for the schools and the council.

Impact on Young People and Future Generations

22. The decisions the Council makes now not only affect current residents, but may have long term impacts, both positive and negative, on young people and future generations. These impacts may not immediately be fully apparent or may not emerge for a number of years or decades. Impacts will be interrelated across the various domains of young people's lives from housing, employment or training, health and the environment.

23. The consultation undertaken to date on the proposed amalgamation of Chillerton and Rookley Primary School and Godshill Primary School through the closure of Chillerton & Rookley Primary School invited those young people and their families to provide their views and suggestions. This information forms part of the final decision making process.

Corporate Aims

24. The recommendation in this report directly links to the Corporate Plan 2021-25 priority which is to work with local communities to maintain and ensure appropriate local school provision. In addition to this it supports the commitment that through ongoing business of the council we will work with and challenge schools' performance to ensure that all are good or outstanding, and to ensure work is undertaken to challenge schools in financial deficit to secure a more sustainable position for the schools and the council.

FINANCIAL / BUDGET IMPLICATIONS

25. Schools are funded through the ring-fenced dedicated schools grant (DSG) using a local funding formula, that mirrors the Department for Education's (DfE) national funding formula. The ability to deviate from the national formula has significantly reduced in recent years and will cease altogether by 2027/28 at the latest. The revenue funding passed through the local authority for maintained schools is strictly controlled by operational guidance supplied by the DfE. Most of the funding to schools is based upon the number of pupils on roll. Therefore, when the overall pupil numbers in the school reduce, then the funding allocation is reduced on a per pupil basis.
26. Under the current local and National Funding Formula school budgets are heavily linked to the number of pupils on roll. The age-weighted pupil unit (AWPU) is the basic funding that all pupils attract. The current AWPU funding amount is £3,442 for primary pupils and this illustrates how critical pupil numbers are to the funding of each school's provision. Schools with fewer pupils than expected can result in pressures that may affect standards, outcomes for children and therefore the overall viability of the school. A balanced budget is one that will lead neither to an excessive surplus at the end of the year nor to a deficit. A budget is well-informed when it takes account of the best available information on all variables, such as pupil numbers and staffing changes. Setting an annual budget is an absolute requirement as part of the local authority's budgeting arrangement as set out in the Schemes for Financing schools. Under school funding regulations, individual maintained schools must have devolved funding and individual responsibility to ensure expenditure does not exceed income. This is monitored and will lead to intervention to ensure financial viability if budget planning shows a future or continued deficit.
27. The pupil forecast for Chillerton and Rookley shows a continued fall in pupil numbers based on the historic trend of recruitment for reception year pupils. The school had 11 pupils on roll at the January 2023 census. This includes those pupils on roll at Chillerton and Rookley but being educated on the Godshill site for operational reasons.
28. The financial position of Chillerton and Rookley Primary School has remained unresolved since 2016/17 and for the financial year 2022/23 the cumulative deficit is now at £74,372. The school is currently under the Notice of Concern, which is

required to be issued to schools that are more than 5 years in deficit. The school budget share for 2022/23 was £266,000 with over £194,000 (73%) of this spent on staffing. The 2022/23 deficit is significant and an equivalent of 38% of the school's annual core funding.

29. Godshill Primary School was issued with the Notice of concern in June 2022, following confirmation of the outturn position for 2021/22 and the required submission of three-year budget plan in May 2022. The school successfully came out of deficit in 2022/23 and is currently predicting to be in surplus in the 2023/24 financial year. In comparison, the school budget share for 2023/24 for Godshill is £700,000, two and a half times larger, making it better placed to make the necessary efficiencies and structural changes to continue being affordable going forward.
30. Under the Isle of Wight Scheme for Financing Schools, the final balance of any closing schools reverts to the Council and therefore, the financial risk to the local authority needs to be closely monitored to minimise any future deficit should the school be closed.

LEGAL IMPLICATIONS

31. Decision-makers will need to bear in mind at this stage that some changes to maintained schools are considered 'prescribed alterations', which will require a specific statutory process to be followed for their correct implementation. This process is set out in the statutory guidance 'Making significant changes ('prescribed alterations') to maintained schools' updated in January 2023. Additionally, any proposal that requires a school to close (including a closure to amalgamate) will need to consider the statutory guidance 'Opening and closing maintained schools' updated in January 2023. Both Godshill Primary School and Chillerton and Rookley Primary School are designated as rural primary schools, the closure of which requires additional consultation and due consideration by decision-makers.
32. The guidance states that the Council should adopt a presumption against the closure of rural schools. However, this does not mean that a rural school will never close, but the case for closure should be strong and a proposal must be clearly in the best interests of educational provision in the area. When producing a proposal to close a rural primary school, the proposer must consider:
 - *the likely effect of the closure of the school on the local community*; the closure of Chillerton and Rookley Primary School can be mitigated by the proposed relocation of pupils to Godshill Primary School if parents wish to have their children educated at that school.
 - *the proportion of pupils attending the school from within the local community, i.e. is the school being used by the local community*; Chillerton and Rookley Primary School is not the school of choice by the majority of its community. As at June 2023 of the 9 primary age pupils who had Chillerton in their address only two attend Chillerton and Rookley Primary School.
 - *educational standards at the school and the likely effect on standards at neighbouring schools*; To ensure that the 9 pupils on roll at Chillerton & Rookley receive the very best educational, social, and emotional opportunities they have since January 2023 been taught on the Godshill site. This has ensured they have access to all the elements of the national curriculum, and a wide range of extra-curricular activities.

- The decision, in agreement with their parents to move them to the Godshill site was required as no teacher could be recruited to teach them on the Chillerton & Rookley site.
- This move to Godshill and the proposed closure of Chillerton & Rookley has and will have no impact on any neighbouring schools. Godshill have been able to accommodate all the required children from Chillerton & Rookley.
- *whether the school is now surplus to requirements (e.g. because there are surplus places elsewhere in the local area which can accommodate displaced pupils, and there is no predicted demand for the school in the medium or long term);* there are sufficient surplus places within the planning area at Godshill Primary School to accommodate the displaced pupils currently on roll at Chillerton and Rookley Primary School.
- *any increase in the use of motor vehicles which is likely to result from the closure of the school, and the likely effects of any such increases;* In November 2020 of the thirty-four pupils on roll at Chillerton and Rookley Primary, Godshill Primary was the nearest for eight of those pupils, and twelve travelled from out of area. The closure of Chillerton and Rookley Primary School and the subsequent relocation of pupils to Godshill Primary School will therefore not necessarily increase the overall use of the motor vehicle for the school run as parents drive their children to Godshill instead of Chillerton.
- *any alternatives to the closure of the school (including academy conversion, federation, or extending the school to provide local community facilities);* As noted within this report a number of alternatives have been considered and the local authority believes the closure of Chillerton and Rookley Primary School provides the best opportunity to stabilise the educational offer in that part of the Island.
- *transport implications i.e., the availability, and likely cost of transport to other schools and sustainability issues;* Chillerton resident pupils will be entitled to local authority funded transport if they are eligible under the Home to School Transport Policy, to what becomes their nearest school if Chillerton and Rookley Primary School closes. A previous paragraph provides further detail.
- *the size of the school and whether it puts the children at an educational disadvantage e.g., in terms of breadth of curriculum or resources available;* with a possible number on roll of 15 for the 2022/23 academic year the school was likely to be able to run only two classes, one for Key stage 1 pupils and the other for Key Stage 2 pupils. Running one class across three (KS1) or four (KS2) years impacts on the breadth of curriculum that can be offered at the school.
- *the overall and long-term impact on the local community of the closure of the village school and of the loss of the building as a community facility;* no decision has been made about the future of the Chillerton and Rookley Primary School site. The School building has been listed as an Asset of Community Value at the request of the local community.
- *wider school organisation and capacity of good schools in the area to accommodate displaced pupils;* pupil numbers in the area are forecast to fall over the next few years so it is anticipated that there will be places available at good schools in the area.

33. The proposed option to amalgamate Chillerton and Rookley Primary School with Godshill Primary School to be achieved through the closure of Chillerton and Rookley Primary School will require consideration of the statutory guidance in respect of rural school closures.
34. Any closure of a rural primary school requires consultation with: the parents of registered pupils; the governing body; the pupils; the teachers and other staff, the governing bodies, teachers and other staff of any other affected school(s); the parents of any pupils at other schools who may be affected; trade unions; the MP and any other interested organisation.
35. Making prescribed alterations requires a four-stage process to be followed prior to implementation, which includes a period of formal consultation. While there is no statutory pre-publication consultation period for this type of change, the statutory guidance makes it clear that there is a 'strong expectation' that schools and Local Authorities will consult all interested parties in developing their proposal prior to publication, to take into account all relevant considerations.
36. A prescribed alteration relevant to this proposal is the enlargement of premises (expansion). The prescribed alterations' statutory process must be followed to enlarge premises if the proposed enlargement is permanent (longer than 3 years) and would increase the capacity of the school by more than 30 pupils and the lesser of 25% or 200 pupils. The statutory process for prescribed alterations does not need to be followed for expansions falling short of this threshold.
37. The prescribed alterations guidance also suggests that local authorities are not expected to propose expansion of underperforming schools unless there is a strong case that this would help to raise standards. Where there is a proposal to expand a school that is rated inadequate, the guidance requires the local authority to send a copy of the proposal to the relevant Regional Director.

EQUALITY AND DIVERSITY

38. Consideration must be given as to whether there are any sex, race, or disability discrimination issues that arise from the changes being proposed. The proposal being put forward by the council in this report; The future of Chillerton & Rookley Primary School will have no negative impact on equality and diversity.
39. The policies of the Council in relation to equal opportunities and eliminating discrimination will continue to apply should a change be approved.
40. Council officers will work closely with the headteacher and governing body to assess any support that might be required by students and their families / carers should any proposed changes be approved.

PROPERTY IMPLICATIONS

41. No decision has been made about the longer-term use of the Chillerton & Rookley Primary School site should a decision be taken to close the school. However, concerns have been raised by consultees around the legal position of the Chillerton & Rookley Primary School site, should the decision be taken to cease educational use on it.

42. The school land is held on-trust by the council. If the school is closed the property (or any proceeds of sale) could revert to the beneficiaries of the estate of the original owner.
43. The proceeds of sale could be used to fund the purchase or improvement of alternative school premises. Alternatively, the council could apply to the Charity Commission to set up a scheme for a similar charitable purpose which would extinguish the trust.

OPTIONS

44. The options that the Council have considered and consulted upon prior to deciding on its preferred option are:
 - i) To approve the publication of a Public Notice that achieves the amalgamation of Godshill Primary School and Chillerton and Rookley Primary School through the closure of Chillerton & Rookley Primary School with effect from the 31 December 2023 as set out in the report.
 - ii) To not approve the publication of a Public Notice to amalgamate Chillerton and Rookley Primary School with Godshill Primary School to be achieved through the closure of Chillerton and Rookley Primary School with effect from the 31 December 2023.

PERSONNEL IMPLICATIONS

45. Staffing implications will be considered subject to the outcome of this consultation. However, with the actions already taken to move the children on roll at Chillerton & Rookley to Godshill it is unlikely that any further alterations to the staffing structure will be required. If any are required, they will be undertaken in accordance with the Council's Restructuring, Redundancy and Redeployment Policy, including the duty to consult with those staff potentially affected by any proposed school closure. Details of any staff consultation will be set out, including the timetable for formal consultation with staff and unions.

RISK MANAGEMENT

46. Financial risks have been reviewed and considered by the Senior Finance Business Partner and further information can be reviewed in the Finance section of this report.
47. An implementation group will be formed if required to take forward the final recommendation. It will meet on a monthly basis or more regularly if required; it will be chaired by a senior education and inclusion officer. Representatives will include governors, headteacher and local authority officers with expertise in governance, property, HR, finance, admissions, and school improvement. They will ensure that risks associated with the final recommendation are identified and mitigated.

EVALUATION

48. The recommendation in this report to amalgamate Chillerton and Rookley Primary School with Godshill Primary School to be achieved through the closure of Chillerton

and Rookley Primary School has been carefully considered. It has taken into account many different factors and fully considered all the feedback received during both consultation periods. The recommendation will reduce the number of surplus places in the area and support the on-going provision of high quality education across Godshill and Chillerton & Rookley and the Island.

Contact Point: Richard Vaughan, Strategic Manager, Children's Services

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Stuart Ashley
Director of Children's Services

CLLR DEBBIE ANDRE
*Cabinet Member for Children's Services,
Education and Lifelong Skills*

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Agenda Item Introduction

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Topic	PRE-DECISION SCRUTINY – EMPTY PROPERTY STRATEGY

BACKGROUND

The committee is to review the Empty Property Strategy, that sets out the Council's approach for dealing with empty properties, before it is due to go to Cabinet for approval on 13 July 2023.

FOCUS FOR SCRUTINY

The role of the committee is not to act as a 'shadow Cabinet'. Its function is to ensure that the principles of decision making have been complied with:

- taking into account all relevant considerations and ignoring those which are irrelevant
- compliance with finance, contract and all other procedure rules
- due consultation and proper advice is taken, and alternative options considered before decisions are reached
- impartiality and an absence of bias or pre-determination
- any interests are properly declared
- decisions are properly recorded and published
- decisions are proportionate to the desired outcome
- respect for human rights and equality impacts
- a presumption in favour of transparency and openness
- clarity of aims and desired outcomes
- due consideration of all available options
- reasons are given for decisions

OUTCOME

Does the committee support the proposed recommendations, or wish to report any comment to Cabinet?

APPROACH

The Cabinet report to be submitted to the committee.

DOCUMENTS ATTACHED

Report to Cabinet on 13 July 2023 - Empty Property Strategy (Residential) 2023-2028
Appendix 1 – Empty Property Strategy 2023-2028

Contact Point: Melanie White, Scrutiny Officer, ☎ 821000 ext 8876
e-mail melanie.white@iow.gov.uk



Cabinet report

Date **13 JULY 2023**

Title **EMPTY PROPERTY STRATEGY (RESIDENTIAL) 2023-2028**

Report of **CABINET MEMBER FOR ADULT SERVICES & HOUSING, PUBLIC HEALTH AND HOMELESSNESS**

EXECUTIVE SUMMARY

1. The Empty Property Strategy (Residential), which covers residential properties, has been reviewed and updated.
2. It is not a statutory requirement for councils to have an empty property strategy. However, it is considered good practice to have one to provide a framework for action.
3. One of the key areas of the Corporate Plan is to increase the availability of affordable housing. The Housing Strategy recognises that bringing empty property back into use will utilise existing housing stock. The Corporate Plan includes the requirement to keep the Empty Property Strategy under review.
4. There are currently 72,359 residential properties on the Isle of Wight with an estimated 956 that are empty according to the Council Tax base. A residential property is considered empty if it has been vacant and unfurnished for six months or more. The number of homes empty six months, or more is 639. Most empty homes are sold or re-let within a year and only 109 remaining empty more than two years.
5. The empty property strategy aims to bring long term empty homes back into use to increase the supply of quality and affordable homes for Island residents and in turn reduce the detrimental impact of empty properties on communities.
6. This will have some additional benefits to the council including
 - Detection of fraud or recovery of unpaid council tax
 - Reduced criminal activity and anti-social behaviour
 - Addressing the blight caused by eyesore properties
7. The Empty Property Strategy will ensure the Council acts strategically to push the empty homes agenda to promote good practice with the overall aim of reducing the numbers of empty homes.

RECOMMENDATION

8. That Cabinet adopt the Empty Property Strategy (Residential) as attached at appendix 1 and delegate authority for minor amendments to the Director - Adult Social Care and Housing Needs in consultation with the Cabinet Member for Adult Services & Housing, Public Health and Homelessness.

BACKGROUND

9. An Empty Property Strategy, which covers residential properties, is not a statutory requirement but the Council has one to ensure that empty properties numbers are monitored and the associated community issues are managed.
10. There are 72,359 properties on the Island and the number of properties empty more than six months at the end of March 2023 was 639 (0.88%). The total number of empty residential properties remains relatively consistent and most empty homes are sold or re-let within two years, with only 109 remaining empty for more than two years.
11. Residential properties remaining empty for more than 2 years are considered long term empty homes. The focus will be to bring long term empty homes back into use to increase the supply of quality and affordable homes for Island residents and in turn reduce the detrimental impact of empty properties on communities.
12. The strategy objectives are to:
- Maintain relevant, accurate and up to date information relating to empty homes on the Island
 - Bring empty homes back into use by encouragement and advice to property owners
 - Consider options for action when negotiations fail to bring empty homes back into use.
 - Raise awareness of the Empty Property Strategy (Residential) with residents, property owners and community, town and parish councils.
13. We will achieve this through an action plan focussed on
- Identification of empty properties
 - Engagement with property owners
 - Working in partnership
 - Raising awareness
 - Monitoring the number of empty homes and how long they are empty
 - Monitoring the number of empty homes that come back into use
 - Prioritising intervention and enforcement where necessary
14. The Council Tax database is the government's preferred method to measure the number of empty homes. It is, however accepted that this method does not provide a full account of all empty properties. The action plan that supports this strategy sets out how the empty property role can help provide additional information, informing Council Tax team when empty properties are reported using housing renewal information, planning records and customer complaints to assist in an accurate database of empty homes.

CORPORATE PRIORITIES AND STRATEGIC CONTEXT

15. Within reference to the [Corporate Plan 2021 – 2025](#) the Empty Property Strategy supports several key areas of activity

Provision of affordable housing for Island Residents

16. Bringing empty properties back into use can increase the supply of housing. Raising awareness and sign posting property owners to the Council's Landlord Incentive Scheme may result in more landlords joining the scheme.

Responding to climate change and enhancing the biosphere

17. The refurbishment and renewal of existing housing stock can help reduce the greenhouse gas emissions because of energy use in buildings. Encouragement of owners to upgrade their property to improved insulation standards will support the council net zero emissions as an island by 2040

Economic Recovery and Reducing Poverty

18. The Isle of Wight is a UK visitor destination for tourists. This strategy supports economic recovery by prioritising empty properties in dilapidated condition that are in prominent and sensitive locations such as Conservation Areas and town centres.

19. The encouragement of empty property owners to bring properties back into use will result in opportunities for investors to buy dilapidated properties as more empty properties are put on the market. This refurbishment of empty properties provides employment and skills development for small to medium builders. Supporting the council's ambition for regeneration increased confidence in an area supports economic growth by renewal and occupation of unused properties.

Impact on Young People and Future Generations

20. The strategy aims to bring empty properties back into use and so could provide properties for families and young people to live locally now and in the future. This will also create places where young people and future generations have a stake in where they live.

Corporate Aims

21. One of the key areas within the Corporate Plan is to increase the availability of housing across the Island. The Council will work to bring empty properties back into use, including the use of compulsory purchase if necessary. The Council corporate aim is to wherever possible bring appropriate empty and derelict buildings back into use for affordable housing. Bringing empty properties back into use can increase the supply of housing.

CONSULTATION

22. Internal consultation has been carried out but there is no statutory duty to consult.
23. The strategy was shared with Community, Town and Parish Councils and registered social landlords to obtain feedback.

FINANCIAL / BUDGET IMPLICATIONS

24. There may be cost implications as a result of this strategy. The activities of the empty property intervention may result in associated costs of individual enforcement actions that will need to be found in existing budgets and or reclaimed through the legal process by way of cost applications in successful cases. If there is an identified risk in the ability to claim back relevant costs, this will limit the enforcement decisions to reduce/ negate that risk.
25. The costs of deferring enforcement could lead to increased cost to the authority, for example in some cases the authority may need to carry out works in default. If the council do not apply enforcement the deterrent of the strategy will not be so effective.

LEGAL IMPLICATIONS

26. The Local Authority have a number of legislative powers that enable them to action the aims of the Empty Property Strategy. It is acknowledged the majority of empty property will come back into use through advice and guidance, threat of enforcement and serving of notice used only after negotiations fail.
27. Statutory Notices served under a range of legislation can require owners to address issues of neglect and safety. It should be noted owners have rights to appeal against notices. Any decisions will be made in line with the enforcement policy relevant to that power or department. Although the powers available under legislation may deal with a specific problem, they may not necessarily result in the empty property coming back into use.
28. Local Authorities can recover charges against a property through its enforced sale. This option may be used when there is a debt against the property registered as a charge at the Land Registry. Council tax debts or works in default can be charged to a property in many cases bringing about a sale and a change in ownership will mean the property comes back into use
29. The powers to compulsory purchase an empty property will depend on the reason identified for it being subject to the power to CPO. These powers should only be used as a matter of last resort to achieve the strategy aims and would have to regard to the Crichel Down rules guidance. Before the powers are used the council would be expected to demonstrate that it has taken reasonable steps to acquire all of the land and rights included in the and CPO by agreement with appropriate compensation paid. Compulsory purchase is intended as a last resort.

EQUALITY AND DIVERSITY

30. The council as a public body is required to meet its statutory obligations under the Equality Act 2010 to have due regard to eliminate unlawful discrimination, promote equal opportunities between people from different groups and to foster good relations between people who share a protected characteristic and people who do not share it. The protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

31. It is not considered that the Empty Property Strategy will have any direct adverse implications to any of the protected characteristics groups as these services operate within protocols to ensure equal access to services.

SECTION 17 CRIME AND DISORDER ACT 1998

32. This Strategy directly assists the local authority in meeting its statutory duty under Section 17 of the Crime and Disorder Act 1998 (as amended by Police and Justice Act 2006) in the determining of further enforcement action to achieve compliance and reduce criminal behaviour.

OPTIONS

33. To agree to adopt the Empty Property Strategy (Residential) as attached at appendix 1 and delegate authority for minor amendments to the Director - Adult Social Care and Housing Needs in consultation with the Cabinet Member for Adult Services & Housing, Public Health and Homelessness.
34. To agree to adopt the Empty Property Strategy (Residential) as attached and delegate authority for minor amendments to the Chief Executive in consultation with the Cabinet Member for Adult Services & Housing, Public Health and Homelessness.
35. To seek changes to the Empty Property Strategy and request that a revised draft is brought back to the Cabinet at a later date for further consideration.
36. Not to adopt an Empty Property Strategy.

RISK MANAGEMENT

37. The current empty property policy requires a review in regard to the current national and local context, and to be fully compliant with the Regulators' Code under the Legislative and Regulatory Reform Act 2006. This legislation places a duty on the Isle of Wight Council as a regulator to have regard to the principles specified in the legislation.
38. If the Council does not adopt this strategy it will result in no coordinated approach to the management of empty properties and the risk that the number of properties and associated issues increases.

EVALUATION

39. The Island has an increasing demand for housing and by adopting this strategy it will manage the number of properties that remain empty and help to manage the associated community issues.
40. The Empty Property Strategy is one tool that the Council can use to support delivery of its aspirations to address the housing issues on the Island.

41. The review focused on the need for a Empty Property Strategy as a framework for enforcement action. The work being undertaken by Revenue and Benefits in light of the Levelling Up Bill which has had its first reading in parliament has been incorporated into the aims and objectives of the strategy. The main changes within this Strategy are:
- The document provides clear strategic direction and guidance linked to the Councils Corporate Plan and the Housing Strategy.
 - The document extends the need to work co-operatively across the Council and with our external partners to ensure an accurate database of empty properties.
 - Makes clear that the Empty Property Strategy is a proportionate and graduated approach to encouragement and working with owners of empty property to see most buildings brought back into use before two years. But also defines a robust approach where negotiations fail and enforcement action is considered necessary.
42. Responses to the consultation included the emphasis of enforcement action policies for the various regulatory powers available to different areas of the Council. The availability of resources and the challenges of tracing owners on whom to serve notices for enforcement. The complexities of the classification and identification of empty residential buildings to be able to accurately monitor the number of empty properties. The potential for involvement by Community, Town and Parish Councils and Community Led housing groups in identifying empty properties.

APPENDICES ATTACHED

43. Appendix 1 - Empty Property Strategy (Residential) 2023-2028

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Empty Property Strategy (Residential) 2023 – 2028

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1 Document Information

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1.0	19/04/2023	Draft to Empty Property Group for comment
1.1	25/04/2023	Updated at Empty Property Group
1.2	01/06/2023	Update Council Tax meeting
1.3	06/06/2023	Action Plan Added
2	200623	Update from CMT

1. Executive Summary

The overall purpose of the Empty Property Strategy (Residential) is to understand the impacts of empty residential property on the Island's housing supply and explain what measures the Council can take in terms of bringing empty homes back into use.

Whilst any empty property is a wasted resource, the Isle of Wight does not suffer a significant issue with empty homes. This strategy therefore sets out a balanced approach to tackling empty homes in a way that is fair and proportionate in relation to the overall supply of housing. There are always dwellings which naturally become vacant for short periods of time due to buying and selling. A residential property is considered empty if it has been vacant for six months or more.

Bringing empty properties back into use will not only provide a source of accommodation but also have additional benefits including detecting fraud and unpaid council tax, reducing crime and antisocial behaviour, tackling the negative affect on the surrounding area and reducing the risk of damage to adjoining properties.

The overall objectives of the Empty Property Strategy (Residential) are to.

- 1. Maintain relevant, accurate and up to date information relating to empty homes on the Island.**
- 2. Bring empty homes back into use by encouragement and advice to property owners.**
- 3. Consider options for acting when negotiations fail to bring empty homes back into use.**
- 4. Raise awareness of the Empty Property Strategy (Residential) with residents, property owners and community, town and parish councils.**

Owners of long term empty residential properties (more than 2 years) will be contacted to clarify their intentions for the property, advice and assistance will be provided wherever practicable. Where practical support has not resulted in the improvement and occupation of the dwelling, the Council have a range of legal powers available, and the Council will work with other agencies to promote a coordinated approach.

2. Introduction - What is an empty home?

Isle of Wight Council are committed to the provision of affordable housing for Island residents. As part of this commitment both the Corporate Plan and the Housing Strategy include actions to address the situation with empty dwellings.

This Empty Property Strategy (Residential) supports our Corporate Plan and Housing Strategy and outlines how we will identify empty homes and utilise resources effectively to reduce the number of empty homes across the Island.

Our main approach will be to encourage early engagement to prevent properties becoming long term empty. We will utilise the gathering of data, targeted prevention, provide encouragement, make intervention, and where necessary take action.

An empty home is a residential property that is unoccupied and substantially unfurnished for six months or more. There are exemptions for example when a person goes into care. A property which is substantially unfurnished is unlikely to be occupied or be capable of occupation. A property which is capable of occupation can reasonably be expected to contain some, if not all, items from both of the following categories: furniture such as bed, chairs, table, wardrobe or sofa, and white goods such as fridge, freezer and cooker.

Where a property is said to be occupied it will be reasonable for the local authority to cross-check with the electoral roll, or ask for evidence, such as utility bills showing usage of services, driving licence as proof of address, or receipts or other proof of moving costs.

There are broadly two main types of empty property, transactional short term empty property and long-term empty property. Transactional empty property, usually up to six months occur as part of the normal cycle of people moving house. Transactional empty properties are less of a concern, although they may be empty for longer if they need renovation and can still present a problem if their condition becomes a hazard or a detractor to the street scene.

In some cases, a dwelling may appear empty, but is not classed as empty by Council Tax. For example:

- Second homes
- A dwelling in the process of being redeveloped
- A dwelling where the owner is living elsewhere for care

Properties that have been empty for more than six months are monitored by the Isle of Wight Council, residential properties that remain empty after two years are likely to decline without intervention. The reason that a dwelling is left empty may vary including:

- Issues with inheritance / or probate
- Lack of finance to carry out necessary repairs and or refurbishment
- Perceived problems associated with letting of properties
- Unwillingness or capacity to bring property into use

The Isle of Wight Council are keen to work with owners to resolve issues to ensure owners can benefit from bringing empty properties back into use and to help the supply of suitable homes for local people.

3. Strategic Context

Corporate Plan 2021 to 2025

One of the key areas within the Corporate Plan is to increase the availability of housing across the Island. The Council will work to bring empty properties back into use, including the use of compulsory purchase if necessary. The Council corporate aim is to;

- wherever possible bring appropriate empty and derelict buildings back into use for affordable housing.

The corporate plan has a key activity to:

- Annually increase the number of empty and derelict properties that are brought back into use and keep the Empty Property Strategy under review so that it remains fit for purpose.

The Corporate plan has set the following as indicators of progress in addressing empty properties on the Island:

- The percentage of long-term empty residential properties (annual measure)
- The number of empty residential properties where Isle of Wight Council intervention results in their being brought back into residential use (annual measure)

Housing Strategy 2020-2025

The Housing Strategy recognises that bringing empty properties back into use can increase the supply of housing and it sets out the way the council can utilise existing housing stock.

- Bring empty properties back into use for residential purposes where possible.
- Improve the quality of stock already built and where relevant improve how it is managed.

The Housing Strategy has set the following actions in the housing action plan in relation to empty properties:

- Use all available powers to bring genuine empty properties back into use.
- Continue to be first port of call for unsecured buildings, offering advice, assistance and enforcement powers if necessary.

The Empty Property Strategy does not seek to duplicate other policies or processes and should be read alongside the following:

- The Council Tax Policy for Second Homes, Long Term Empty Properties and determining discounts for certain dwellings
- Neighbourhoods Enforcement Policy
- Planning Enforcement Policy

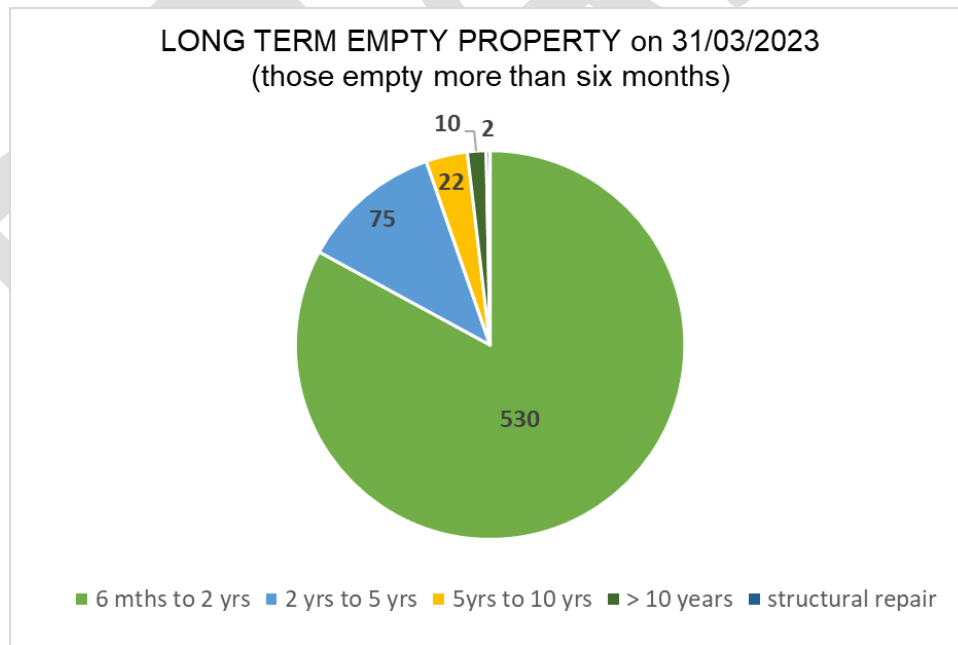
4. National and Local Context

The Department for Levelling Up, Housing and Communities is responsible for gathering the total number of empty properties in the UK (those empty more than six months). Second homes are not included in empty homes figures.

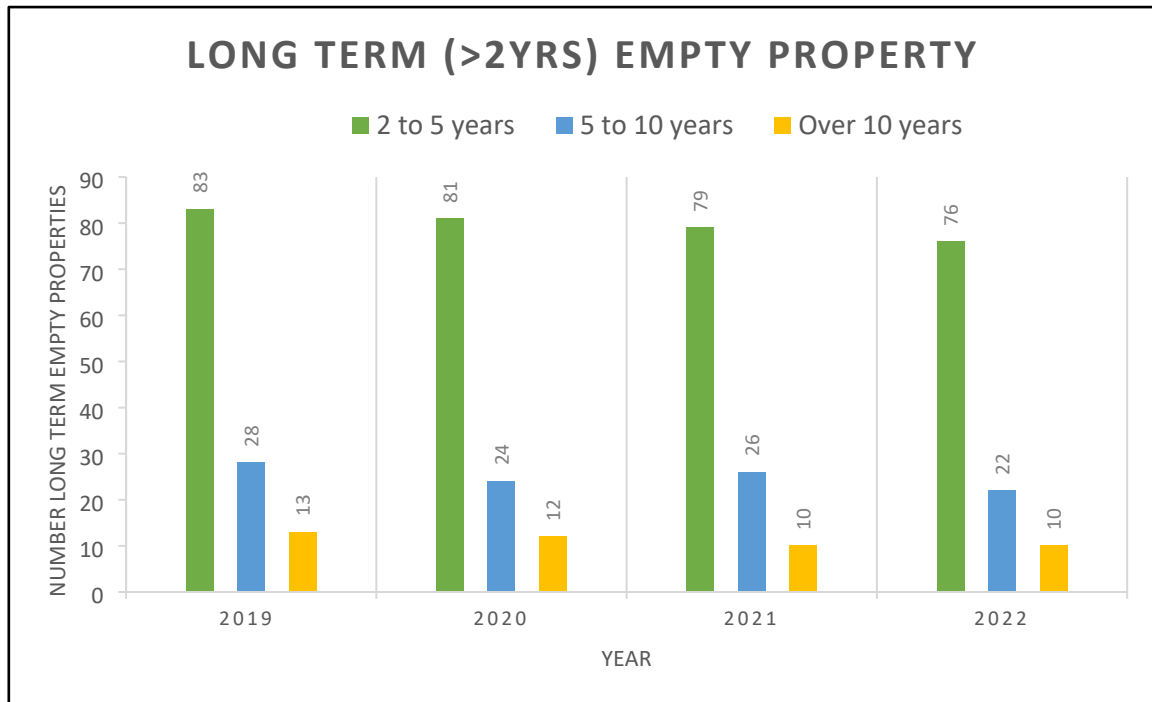
As of 31 March 2023, there are currently 72,359 properties on the Island. The total number of empty homes according to Council Tax records is **956**. (source Isle of Wight Council Tax base).

- 317 are empty less than six months
- 530 are empty more than 6 months but less than 2 years
- 109 are empty more than 2 years

Property empty for less than six months is not problematic and is attributed to people selling or changing tenants. This provides a certain amount of churn required in a housing market. As a proportion to the overall number of homes (72,359) the number of empty properties **639** (those empty more than six months) represents just 0.88% of the overall housing stock.



Of these **639** empty properties (empty more than 6 months) only **109** have been left empty more than 2 years. More than two years is the current length on time at which an Empty Dwelling Management Order (EDMO) can be considered, and a Council Tax premium can be applied. Council Tax premiums do not currently apply to second homes.



Powers previously held by central government to vary council tax paid on some empty homes has been devolved to a local level. The Isle of Wight Council have had an empty property premium under Council Tax Policy S11 since its introduction in April 2021.

Government regulations allow local authorities to apply a council tax premium depending on the length of time the dwelling has been empty and substantially unfurnished. The Isle of Wight Council applies the council tax premium in respect of empty periods as below:

- Empty Property Premium 100% two to five years
- Empty Property Premium 200% five to ten years
- Empty Property Premium 300% over ten years

More recently, the Levelling Up and Regeneration Bill, had its first reading in Parliament in May 2022. The bill proposes to introduce changes to the qualifying period for the use of the empty home premium. The bill if passed into legislation proposes to allow local authority to apply the premium after one year (as opposed to two years which is the current requirement). The Isle of Wight Council will consider whether to amend their Council Tax policy should the bill be passed. The Levelling Up and Regeneration Bill may also introduce council tax premiums on second homes if it becomes legislation.

5. Strategy aims and objectives

The overarching aim of the strategy is to:

Bring long term empty residential properties back into use to increase the supply of quality and affordable homes for Island residents and in turn reduce the impact of empty properties on local communities.

We have four objectives that will underpin the delivery of this aim:

Objective 1: Maintain relevant, accurate and up to date information relating to empty homes on the Island.

The main source for monitoring empty homes is Council tax records. Permission to use the tax database for the purpose of empty homes is set out in legislation in Section 85 Local Government Act 2003.

For this reason, it is important that the Council retains an up-to-date database. An annual review is carried out by the Council Tax team. The outcome of this exercise may result in an increase in the number of empty properties being identified.

Isle of Wight does not have a significant concentration of empty residential properties they are dispersed across the Island. The reason for a home staying empty may include:

- Structural or land stability issues
- The property is being renovated or extended
- The owner has limited finance / time/ skills to manage the property
- The property is subject to Probate
- The owner has emotional sentiment to dwelling and is reluctant to sell
- The owner is being cared for elsewhere
- The property was bought as an investment, but the project is not viable

A property may appear empty but is still being used as a second home, a property may be empty but is not registered as such with Council tax records.

Some dwellings are deliberately kept empty by the owner, the reason may be financial, family disputes, or that the owners have health issues. Some owners have emotional attachment to a property which makes it difficult for them to clear the property and they can't consider selling or renting it. They may be unaware of, or have no concern for, the affect the empty dwelling has on the local area and the surrounding neighbours.

Empty properties are sometimes listed buildings and / or located in a conservation area or might otherwise be considered as a 'non designated heritage asset'. Empty properties in sensitive locations and in prominent locations will be prioritised.

Objective 2. Bring empty homes back into use by encouragement and advice to property owners.

Empty homes are a wasted resource, we need to maximise the availability of housing for people to live in. Empty homes can have a negative impact on the surrounding community including:

- Attracting unwanted crime, vandalism, fly tipping and anti-social behaviour
- Causing damage and reducing values of neighbouring homes
- Requiring additional resources from Council services and Police

- Having overgrown gardens and encouraging vermin
- Adding to the pressure for housing and housing waiting lists

The Empty Property Strategy (Residential) will raise awareness of the empty homes issue. We will promote the strategy within the authority, with local councils, the community and on our web site to ensure owners are aware of the strategy and that the public can report problem empty homes easily.

When an empty residential property becomes a priority case, the council will contact the owner and set out the help and advice we can offer. The ability to bring the dwelling back into use will depend on the level of repairs needed and the desire of the owner to reach a resolution. The council can provide information on VAT relief for renovation of property and assistance in finding tenants through our Landlord Incentive Scheme.

Objective 3. Consider options for acting when negotiations fail to bring empty homes back into use.

The Council aims to bring empty dwellings back into use working with owners. Legal powers will be used where the owner has been unwilling to engage over a significant period of time, and the building is creating a specific problem impacting on the local area. This will be based on a case-by-case basis and is subject to the available resources within the council and available funding.

The Council can use a range of legislative powers to deal with specific issues that are presented by empty properties, such as vermin, nuisance, fly tipping, insecure and dangerous buildings. Where appropriate we will consider the use of improvement notices and where necessary enforcement to deal with cases that have exhausted all means of informal encouragement.

Improvement notices

Shall be used where the condition of the property is such that it poses a threat to public health, safety, or the integrity of the property or the neighbouring property. The council has powers given through law to address environmental nuisance or blight to the amenity of an area. When making decisions for regulatory action, we will take account of the location of the property, the condition of the property, complaints received, association with anti-social behaviour, the degree of neighbourhood blight caused and any explanation by the owner for the reason why the building is empty. Where costs are incurred by the Council through carrying out works in default of improvement notices, they will be recovered from the property owner wherever possible.

Any decisions will be made in line with the enforcement policy relevant to that power or department. Although the powers available under legislation may deal with a specific problem, they may not necessarily result in the empty property coming back into use.

Options for action to bring the property back into use include.

Voluntary Purchase

Where there would be a significant public benefit and the property cannot be sold on the open market, in certain circumstances, the Council may consider a voluntary purchase this would require an agreement of the relevant parties. Any arrangement with a third party would include an agreement to bring the property back into use and or redevelop for the purpose of residential accommodation. The Council will where possible work in partnership with registered providers, community town / parish councils, charitable organisations and community led housing groups where such opportunities arise.

Enforced Sale

Local Authorities can recover charges against a property through its enforced sale. This option is used when there is a debt against the property registered as a charge at the Land Registry. Council tax debts or works in default can be charged to a property in many cases bringing about a sale and a change in ownership will mean the property comes back into use.

Empty Dwelling Management Orders (EDMO)

An EDMO can be made where an owner leaves a property empty. The council can use a partner housing association to undertake the management of the property for a set period, up to seven years. However, the EDMO is open to appeal and can be burdensome.

Compulsory Purchase Orders (CPO)

Compulsory Purchase Orders provide the final sanction to ultimately facilitate the renovation and reoccupation of the most problematic empty properties. CPO's are seen as the ultimate consequence of owners leaving problem empty properties. This route is both resource intensive and costly and CPO's should only be used where there is a compelling public benefit.

Objective 4. Raise awareness of the Empty Property Strategy (Residential) with residents, property owners and community, town and parish councils.

Empty dwellings can have a direct impact on adjoining property through issues of damp and structural problems. Unsightly dwellings can have a detrimental impact on being able to sell and effect neighbouring house prices resulting in a lack of pride in an area. There is also the probability of empty dwellings attracting crime and anti-social behaviour which causes anxiety to residents and uses up police resources.

Encouraging the use of empty properties particularly in town centres will improve the local economy and the attraction of visiting town centres for visitors. Community, Town and Parish councils, community groups and residents are encouraged to advise the council when and where the empty properties occur if they are creating a problem in their local area or where they know the owner may need some assistance.

6. Performance Monitoring and review

The purpose on this strategy is to explain the current situation regarding empty homes on a local basis and sets out the Councils plans for supporting owners to bring property back into use. The strategy will be monitored and reviewed, to ensure the Council is achieving the objectives of the strategy it is proposed to

- Monitor the number of empty homes and how long they are empty
- Develop best practice through research and liaison with partners
- Create and review an action plan on an annual basis, based on the up-to-date position on empty properties.

The action plan identifies a range of approaches and activities that can be used to bring empty property back into use and address the related challenges. Data related to empty property can be limited and challenging to collect, and property can be empty for various and complex reasons at individual, societal and fiscal levels. Additionally, bringing property back into use requires dedicated effort.

The strategy and action plan will ensure the Council acts strategically to push the empty homes agenda to promote good practice with the overall aim of reducing the numbers of empty homes.

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Appendix 1 - Government data

Data is published by the government in the live tables on vacant dwellings is drawn from several separate sources, each of which has its own statistical release:

- [Local authority housing statistics \(This collection brings together all documents relating to local authority housing data.\)](#)
- [Council Taxbase](#)
- the Regulator of Social Housing's [Statistical data return](#)

Interested parties may wish to see [notes and definitions for dwelling stock data](#), which includes the housing flows reconciliation (HFR) returns form and full guidance.

Appendix 2 - List of Legislative Powers

• Town & Country Planning Act 1990

- Section 215, Adverse affect on the amenity of an area

• Listed Buildings and Conservation Areas Act 1990

- Section 9 – Unauthorised works to listed building

Building Act 1984

- Section 59 – Drainage (Inadequate Provision or Defective)
- Section 77 – Dangerous or dilapidated buildings
- Section 76 – Premises prejudicial to health or nuisance
- Section 78 – Dangerous Buildings (Emergency Works)

• Housing Act 1985 & 2004

- Section 11 – Improvement Notice
- Section 20 – Prohibition Order
- Section 28 – Hazard Awareness Notice
- Section 40 – Immediate Risk (Cat1 Hazard)
- Section 43 – Emergency Prohibition Order
- Section 265 (1985) – Demolition Order

• Environmental Protection Act 1990

- Section 79-81 – Statutory Nuisances (Smoke, Dust, Noise, Smell)
- Abatement Notice (Part 3 EPA 1990)
- Prevention of Damage by Pest Act 1949
- Section 4 – Destruction of rats and mice

- **Local Government (Miscellaneous Provisions) Act 1982**

- Section 29 – Prevention from Unauthorised Entry

- **Public Health Act 1936**

- Section 83 & 84 – Filthy & Verminous Articles/Premises

- **ASB, Crime & Policing Act 2014**

- Community Protection Notices

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Empty Property Strategy (Residential) 2023-2028

Empty Property Strategy - Action Plan	23/24	24/25	25/26	26/27	27/28	Lead
Objective 1: Maintain relevant, accurate and up to date information relating to empty homes on the Island.						
Policy and procedures- Determine what empty property policies and procedures are required and put in place	X	X				EPO
Council Tax Data - Receive monthly performance data from Council Tax and review changes etc.	X	X	X	X	X	EPO
Gathering Information - Ensure that reports received about empty property gets forwarded to Council Tax and records updated with 14 days	X	X	X	X	X	EPO
Record Complaints - Ensure online reporting of problem empty homes is followed up and complaints dealt with	X	X	X	X	X	EPO
Liaise with Council Tax team to ensure empty property data is up to date	X	X	X	X	X	EPO
Agree Prioritising Criteria - Create a scoring matrix for empty property to enable prioritisation of workload	X	X	X	X	X	EPO
Prioritise Cases - Assess all empty property over 2 years against scoring matrix to prioritise cases	X	X	X	X	X	EPO
Reporting - Annual Report to Housing Programme Officer Board and Housing Members Board on progress including update on action plan	X	X	X	X	X	SMHED
Monitoring- Set up a recording procedure to capture actions on empty homes and provide performance monitoring information and stats	X					EPO
Objective 2: Bring empty homes back into use by encouragement and advice to property owners.						
Identify owners of long term empty property - proactive warning of empty property premium approaching. Identify owners of multiple empty property	X	X	X	X	X	EPO

Empty Property Strategy (Residential) 2023-2028

Empty Property Strategy - Action Plan	23/24	24/25	25/26	26/27	27/28	Lead
Engage with empty property owners focusing on- Registered providers to ensure that social housing is not left empty for long periods Owners of multiple empty property to understand reasons and encourage bring back into use. To ensure awareness of Landlords Incentive Scheme is known to owners of empty properties To ensure awareness of VAT reduction is known to owners of empty properties	X	X	X	X	X	EPO
Funding- Grant/Incentive Schemes research what could be offered to support landlords bring back into use Investigate funding options for landlord repair grants and other incentives Investigate options for the purchase/lease of empty properties (Council/Registered Providers) and make available for letting to council nominees		X				EPO
Develop a capital bid for funding to support new initiatives to bring empty homes back into use		X				SMHED
Objective 3: Consider options for taking action when negotiations fail to bring empty dwellings back into use.						
Implement a case management system that ensures accurate information is held for cases that may progress to enforcement	X					EPO
Design and produce an empty homes procedure, consider enforced sale, empty dwelling management orders (EDMO) and compulsory purchase orders (CPO).	X					EPO
Objective 4: Raise awareness of the Empty Homes Strategy with residents, property owners and town and parish councillors.						
Publish the empty homes strategy and keep it under review	X		X		X	EPO
Join Empty Homes Network to ensure process and procedures comply with good practice.	X					EPO
Communications - Develop a communications and publicity programme to raise public awareness of empty homes and how Isle of Wight Council can help owners to sell or use them.	X					EPO
Ensure website includes appropriate information to enable property owners to understand councils role and strategy	X		X		X	EPO

Empty Property Strategy (Residential) 2023-2028

Empty Property Strategy - Action Plan	23/24	24/25	25/26	26/27	27/28	Lead
Information Review content and need for Empty property leaflet	X					EPO
Engage with community town and parish councils to raise awareness of Council approach to manage Empty homes	X		X		X	EPO
Promote Action on Empty Homes Week annually by website and local press.	X	X	X	X	X	EPO

DRAFT



Agenda Item Introduction

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Topic	PRE-DECISION SCRUTINY – ACQUISITION STRATEGY

BACKGROUND

The acquisition strategy is due to go to Cabinet on 8 July 2023, as approval is being sought for the strategy, as it will enable the council to purchase properties for letting. The committee will consider any comment or feedback from the Policy and Scrutiny Committee for Neighbourhoods and Regeneration that will be reviewing the strategy at the committee meeting on 6 July 2023.

FOCUS FOR SCRUTINY

The role of the committee is not to act as a 'shadow Cabinet'. Its function is to ensure that the principles of decision making have been complied with:

- taking into account all relevant considerations and ignoring those which are irrelevant
- compliance with finance, contract and all other procedure rules
- due consultation and proper advice is taken, and alternative options considered before decisions are reached
- impartiality and an absence of bias or pre-determination
- any interests are properly declared
- decisions are properly recorded and published
- decisions are proportionate to the desired outcome
- respect for human rights and equality impacts
- a presumption in favour of transparency and openness
- clarity of aims and desired outcomes
- due consideration of all available options
- reasons are given for decisions

OUTCOME

Does the committee support any proposed recommendations, or wish to report any comment to Cabinet?

APPROACH

A Cabinet report to be provided ahead of the committee meeting. A briefing note to be circulated to the committee following on from the Policy and Scrutiny Committee for Neighbourhoods and Regeneration meeting on 6 July 2023.

DOCUMENTS ATTACHED

Report to Cabinet on 13 July 2023: Acquisition Strategy - Homeless Accommodation 2023-2026

Appendix 1 – Draft Acquisition Strategy - Homeless Accommodation 2023-2026

Contact Point: Melanie White, Scrutiny Officer, ☎ 821000 ext 8876

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Cabinet report

Date **13 JULY 2023**

Title **ACQUISITION STRATEGY – HOMELESS ACCOMMODATION 2023-2026**

Report of **CABINET MEMBER FOR ADULT SERVICES & HOUSING, PUBLIC HEALTH AND HOMELESSNESS**

EXECUTIVE SUMMARY

1. This report seeks adoption of an Acquisition Strategy – Homeless Accommodation (Appendix 1) to support cost effective delivery of our homeless duty.
2. The councils Corporate Plan 2021-25 highlighted the administrations ambition to address the Islands housing crisis.
3. The Council currently contracts with providers for temporary accommodation and this includes Bed & Breakfast, caravans and leased properties. The number of properties needed is demand led and so having flexible cost-effective options is important.
4. This report seeks agreement to the draft Acquisition Strategy - Homeless Accommodation subject to any final amendments agreed by the Cabinet member.

RECOMMENDATION

5. That Cabinet agrees the Acquisition Strategy - Homeless Accommodation as attached at Appendix 1 and delegates authority for minor amendments to the Chief Executive in consultation with the Cabinet Member for Adult Services & Housing, Public Health and Homelessness.
6. That Cabinet delegates authority to the Director of Adult Social Care and Housing, in consultation with the Cabinet Member for Adult Services & Housing, Public Health and Homelessness and S151 Officer, to progress schemes in line with the approved Strategy.

BACKGROUND

7. Since the onset of the pandemic the Island has recently faced a housing crisis like never before. Over 80 per cent of private rented stock has become unavailable for long term lets and approximately 15,000 households struggle to access accommodation themselves in the local housing market.

8. Those on the lowest incomes and highest needs struggle to afford current market rents and this has resulted in an increase in families and individuals presenting themselves as homeless.
9. There is an increasing need for temporary accommodation and due to the reduction in availability the Council is having to find alternative options which are not cost effective. The Acquisition Strategy - Homeless Accommodation seeks to address this by creating an approach for the Council to purchase properties and directly provide temporary accommodation.
10. The Acquisition Strategy - Homeless Accommodation sets out the justification for purchasing properties specifically to address the housing need for temporary accommodation. It also sets out the criteria which will be applied to properties purchased and the financial criteria that each property will need to meet.

CORPORATE PRIORITIES AND STRATEGIC CONTEXT

11. One of the key areas for action within the Corporate Plan 2021-25 is “Provision of affordable housing for Island residents”.
12. The Island has faced a significant housing crisis since the pandemic with over 80 per cent of its private rented stock becoming unavailable for long term lets. Approximately 15,000 households struggle to accommodate themselves in the local housing market. Those on the lowest incomes and highest needs struggle to afford current market rents.
13. The Strategy has set the following as an indicator of progress in addressing the homelessness:
 - (a) The number of temporary housing units delivered (annual measure);

Provision of affordable housing for Island Residents

14. The Housing Strategy ‘vision’ is “To enable everyone living on the Island to have a place they call home” Six strategic priorities underpin this vision which in turn shape the desired outcomes in the action plan to prioritise key actions and expected outcomes.
 - Strategic priority 1: New housing supply – Ensuring the right supply and mix of new homes and increasing affordable housing delivery through the efficient use of land and capital resources including those the council owns or has control of.
 - Strategic priority 2: Housing affordability – Defining “affordability” on the Island through detailed and on-going research of both incomes and housing costs to inform both planning and housing policy going forward.
 - Strategic priority 3: Private sector housing – Ensuring that the private housing sector provides enough good quality market housing through support for developers and landlords and, where necessary, robust quality control and regulation.
 - Strategic priority 4: Partnerships – Enabling housing associations and our other partners to build more new affordable homes for Island residents while maintaining their current homes to a high standard.

- Strategic priority 5: Homelessness and housing need – Reducing homelessness and rough sleeping through effective prevention work and building a new homeless pathway through property solutions and wrap-around services.
 - Strategic priority 6: Special housing needs and vulnerable people – Ensuring that specialist accommodation is available for vulnerable people including primarily extra-care housing for older people and people with disabilities.
15. The key activity is to deliver and facilitate a programme of 100 homes per year through Council led activity over the life of the strategy, and these should mainly be affordable homes. The acquisition of properties will indirectly support the delivery of this objective.

Responding to climate change and enhancing the biosphere

16. The council has set a target to achieve net zero emissions:
- in its business and delivery of services by 2030;
 - across the school estate by 2035; and
 - as an island by 2040.
17. This strategy proposes the acquisition of existing property and therefore there will be limited opportunities to address emissions.

Economic Recovery and Reducing Poverty

18. Whilst the strategy does not have a direct impact on reducing the numbers of residents, and especially children, who are living in poverty (particularly those living in absolute poverty), it will have an indirect impact as the homes provided will be for temporary accommodation and support them accessing affordable housing in the future.

Impact on Young People and Future Generations

19. The decisions the Council makes now not only affect current residents, but may have long term impacts, both positive and negative, on young people and future generations.
20. The acquisition of temporary accommodation will support families living in good quality homes and opportunities are being developed between our services as corporate parents to address the needs of care leavers. The provision of good quality homes improves the life chances of children and young people.

CONSULTATION

21. Internal consultation has been carried out but there is no statutory duty to consult.

SCRUTINY COMMITTEE

22. The Acquisition Strategy - Homeless Accommodation is being considered by Policy & Scrutiny Committee for Neighbourhoods and Regeneration on 6 July 2023 and due to timing their comments cannot be included in this report but will be reported verbally at the meeting.

FINANCIAL / BUDGET IMPLICATIONS

23. The Acquisition Strategy - Homeless Accommodation sets out the formal financial assessment criteria which properties will go through to ensure that they do not have a negative impact on the Councils overall financial position.
24. The purchase and management of properties for temporary accommodation will enable revenue budgets to be better managed.

LEGAL IMPLICATIONS

25. Under the Local Government Act 1972 local authorities can acquire property for use as temporary accommodation within its General Fund.
26. A local authority can hold up to 199 homes and may borrow prudentially through the General Fund for these. Once the 200 homes threshold is reached a local authority must open a Housing Revenue Account and may borrow prudentially to continue to acquire or build homes.

EQUALITY AND DIVERSITY

27. The council as a public body is required to meet its statutory obligations under the Equality Act 2010 to have due regard to eliminate unlawful discrimination, promote equal opportunities between people from different groups and to foster good relations between people who share a protected characteristic and people who do not share it. The protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.
28. It is not considered that the Acquisition Strategy - Homeless Accommodation will have any direct adverse implications to any of the protected characteristics groups as these services operate within protocols to ensure equal access to services.

PROPERTY IMPLICATIONS

29. There are direct implications associated with the day to day repair and longer-term maintenance of properties. Both capital and revenue issues relating to property will be taken account of in the financial assessment.
30. Property related Health & Safety Compliance issues will be managed and monitored by the Housing Team so that there are no breaches.

OPTIONS

31. The options considered by the Cabinet are:
 - (i) To agree the Acquisition Strategy - Homeless Accommodation as attached at Appendix 1.
 - (ii) To seek changes to the Acquisition Strategy - Homeless Accommodation and request that a revised draft is brought back to the Cabinet at a later date for further consideration.
 - (iii) Not to adopt an Acquisition Strategy.

RISK MANAGEMENT

32. If the Council does not adopt this strategy it will need to rely on the market to provide it access to accommodation for homeless families and individuals. This will leave it open to market fluctuations in cost and availability.

EVALUATION

33. The Island has an increasing demand for temporary accommodation and by adopting this strategy it will increase the number of properties for which it has direct control and help to manage the financial implication of a demand-based budget.
34. The Acquisition Strategy - Homeless Accommodation forms the steppingstone to address the Council's aspirations to address the housing issues on the Island.

APPENDICES ATTACHED

35. Appendix 1 – Acquisition Strategy – Homeless Accommodation 2023–2026

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dawn.lang@iow.gov.uk

WENDY PERERA
Chief Executive

(CLLR) IAN STEPHENS
*Cabinet Member for Adult Services and
Housing, Public Health, and Homelessness*

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Isle of Wight Council Acquisition Strategy – Homeless Accommodation 2023-2026

1 Document Information

Title:	Acquisition Strategy
Status:	Draft
Current Version:	1.0
Author:	Dawn Lang Strategic Manager - Housing Enabling & Delivery ✉ dawn.lang@iow.gov.uk ☎ (01983) 821000 ext: 6187
Sponsor:	Wendy Perera Chief Executive ✉ wendy.perera@iow.gov.uk ☎ (01983) 821000
Consultation:	Housing Programme Officer Board Housing Members Board
Approved by:	X
Approval Date:	X
Review Frequency:	Every 3 years
Next Review:	September 2026

Version History		
Version	Date	Description
1.0	130323	Draft

2 Introduction

- 2.1 The Acquisition Strategy sets out the approach that the Isle of Wight Council (IWC) is putting in place to address the impact that homelessness has on individuals and families who are in housing need. The strategic focus to provide temporary accommodation is short term and aimed to relieve financial pressures faced by the Council.
- 2.2 This Strategy focuses on the consideration required in respect of strategic acquisitions and buy-backs, establishing a set of criteria upon which acquisition decisions can be made.
- 2.3 The provision of any affordable housing for temporary accommodation by the General Fund, will need to be closely aligned with the identified need for housing on the Island, as dictated by the housing waiting list, which is reviewed periodically to ensure it is representative of current need.

3 Temporary Accommodation

- 3.1 The cost of temporary accommodation is set out below:

	2021/22 Actual	2022/23 Actual	2023/24 Budget
Bed & Breakfast	257,155	477,924	573,248
Caravan/Holiday Let	119,929	384,901	425,000
Hostel	242,368	233,532	249,879
Leased Accommodation	1,084,415	1,116,680	1,134,071
Total Expenditure	1,703,867	2,213,037	2,382,198
Income	(967,014)	(1,070,942)	(1,222,099)
Net Cost	736,853	1,142,096	1,160,099

- 3.2 The Council uses a range of options to deal with individuals and families who need to access temporary accommodation. The weekly cost of the different types of provision are set out below:

Type	No of times per year	Estimated costs per bedspace/caravan per week Based on 2023/24 Budget
Bed & Breakfast (Emergency Accommodation)	584 placements in B&B totalling 12,975 nights over 2022/23	£309
Caravan	16 caravans block booked	£409
Leased Accommodation	95 direct leases to IWC 25 leased from Vectis HA 26 leased from Southern Group	£149
Hostel	20 units	£35

- 3.3 The number of households in temporary accommodation at 31 March:

Year	Number
2022/23	220
2021/22	203

2020/21	205
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3.4 Snapshot of the accommodation in use at 31 March 2023 (provisional):

Household type	Bed & Breakfast	Caravan/ Holiday Let	Hostel	Leased Accommodation	Total
Singles/Couples	25	0	0	20	45
Families	10	17	18	130	175
Total	35	17	18	150	220

3.5 Housing Register numbers at 31 March 2023:

	1 bed	2 bed	3 bed	4 bed	5 bed	6 bed	Total
Band 1	1	2	0	0	1	0	4
Band 2	173	40	34	20	11	4	282
Band 3	670	350	214	54	2	0	1,290
Band 4	259	269	146	33	1	0	708
Band 5	97	71	18	3	0	0	189
Total	1200	732	412	110	15	4	2,473

4 Strategic Context

4.1 Corporate Plan 2021-25

One of the key areas for action within the Corporate Plan is “Provision of affordable housing for Island residents”.

The Island has faced a significant housing crisis since the pandemic with over 80 per cent of its private rented stock becoming unavailable for long term lets. Approximately 15,000 households struggle to accommodate themselves in the local housing market. Those on the lowest incomes and highest needs struggle to afford current market rents and prices, well below the Government’s accepted standard definition of affordable housing.

The Strategy has set the following as an indicator of progress in addressing the homelessness:

- The number of temporary housing units delivered (annual measure);

4.2 Homelessness Strategy and Rough Sleeping Strategy 2019-24

Losing a home can be the consequence of different social economic or personal reasons. In the past ten years, the number of households affected by homelessness has increased across the country. During this time, welfare reform has introduced the freezing of the local housing allowance, benefit caps for low-income families, and universal credit replacing

several other forms of benefit; average rents in the private-rented sector have increased, whilst demand for social affordable housing has grown, significantly outstripping supply

The impact of homelessness is devastating for individuals and families. It can affect both physical and mental health, educational and employment opportunities (for both adults and children) and has long term consequences for those affected.

Key outcomes from the Homelessness and Rough Sleeping Strategy that will specifically be supported by the Acquisition Strategy are set out below:

- We will endeavour to reduce the use of bed and breakfast for homeless households without children by 50 per cent.
- Deliver and facilitate a programme of 100 homes per year through council-led activity over the life of the strategy, mainly affordable homes. (Isle of Wight Council Housing Strategy 2019-2024).

4.3 Housing Needs and Tenure Types

Locally across the Isle of Wight, the issues around the need for additional homes and an increase in housing supply across all tenures and typologies (houses, bungalows, flats, studios & HMO's) was recognised in the Housing Strategy. Demand as indicated by the housing waiting list supports this.

5 Key Objectives

The key objectives of this strategy are to:

- 5.1 Improve the delivery offer for homelessness individuals and families who require temporary accommodation by having Council owned homes available for direct provision.
- 5.2 Improve the cost effectiveness of the homelessness provision of temporary accommodation.
- 5.3 Take advantage of grant funding opportunities for the provision of housing.

6 Acquisition Criteria

- 6.1 Each potential acquisition will be assessed on an individual basis, in line with the criteria set out below, considering the financial implications of the acquisition and the relative merits in value for money terms.
 - The portfolio of properties acquired will reflect the Housing Register requirements (as set out below) and also take into consideration the homelessness priorities.

Property Size - Beds	Portfolio % Based on all Priority Needs Bands	Portfolio % Based on Priority Needs Bands 1 to 3 bed only
1	48%	53%
2	30%	25%
3	17%	16%

4	4%	5%
5	1%	1%
6	0%	0%

- Building condition, including the costs to bring the property up to a lettable standard
- EPC C or higher

6.2 A proposed acquisition will only be progressed if the criteria are met, and the relative financial benefits can be demonstrated. The key criteria proposed are as follows:

- A property in specific or high demand at any time.
- Market units on existing or future development sites.
- An Isle of Wight Council Shared Ownership unit.

6.3 **Property in specific or high demand**

This key criterion would enable the purchase of suitable dwellings on the open market, in areas of high demand and to meet an identified housing need.

Housing need is evidenced by the number of individuals and families on the Island Home Finder (the Council's waiting list for housing).

6.6 **Market units on existing or future development sites**

Working with registered providers, and potentially developer partners, in delivering housing on our own development sites there may be an option to acquire new build dwellings direct from the developer, purchasing some of the dwellings initially identified as market housing. This would increase the supply of affordable housing delivered on any of these sites, with potential opportunities to acquire both general needs and shared ownership housing.

6.4 **Shared Ownership**

The Council has 55 shared ownership homes. If the owner is looking to sell they have a requirement to notify the Council and give us an opportunity to purchase back their share.

6.5 From time to time there may be other opportunities to acquire an existing dwelling. In these circumstances a business case will be prepared to demonstrate the financial viability of any proposed acquisition.

7 **Financial Criteria**

7.1 The ability to demonstrate value for money in respect of any acquisition is key, with the following tools identified to support the Council's ability to effectively demonstrate this:

- Financial appraisal will be carried out, ensuring that the financial impact of the proposed acquisition or disposal is clearly demonstrated. The key criteria to ensure that the acquisition is financially viable and does not have a negative impact on the overall financial position of the Council are:
 - Breakeven point to be year 1 to minimise the impact the purchase has on the councils financial position
 - Overall viability of cashflow over 50 years
 - Net savings from Temporary Accommodation to be taken account

- The financial assessment will take account of the management and maintenance cost for the property and include appropriate allowances for voids, bad debts, etc.
- Appropriate surveys will be conducted, and could include valuation, condition, full structural, dilapidations, ground condition and asbestos surveys. These surveys should result in an estimate of the potential initial and future investment need for a property, whether it be to support the proposal to dispose of a dwelling or for inclusion in the business case for a purchase, to ensure that the rental stream for a property can support the required investment to render the property lettable.

7.2 In order to achieve the desired policy outcome and achieve value for money the Council will need to take the following factors into consideration when determining the extent to which it should subsidise the acquisition of affordable housing:

1. The number of housing units that it wishes to acquire from its £1m allocation contained within the Capital Programme e.g., a £25,000 per unit subsidy would provide 40 additional social housing units (assuming this was sufficient subsidy to ensure that no additional cost fell to the Council's budget)
2. The subsidy per unit generally provided by other agencies such as Homes England and therefore deemed to be a reasonable public subsidy and cost to the taxpayer
3. That the use of the subsidy for the number of units provided could not be used for an alternative purpose with a greater public outcome - e.g., £1m for 40 units provides an overall better outcome than £1m spent on an alternative public use

As a comparator, Homes England provide subsidies on schemes as follows:

- Social rent grant not above 40% of total scheme costs
- Affordable rent around 25% of total scheme costs

7.3 Rents

Any properties acquired will be let at rent levels that demonstrate that the acquisition is financially viable and does not have a negative impact on the overall financial position of the Council. Ideally this would be at social rent levels, however it is recognised that affordable rent levels are likely to be needed from a financial perspective in most instances.

8 Related Documents

Please refer to the following related plans and strategies.

- Corporate Plan 2021-25
- Medium Term Financial Plan 2021-25
- Homelessness and Rough Sleeping Strategy 2019-24
- Housing Strategy 2020-25

9 Acquisition Strategy - Action Plan

Key Objective	Lead Officer	Outcome	2023/24	2024/25	2025/26
Improve the delivery offer for homelessness individuals and families who require temporary accommodation by having Council owned homes available for direct provision.	Strategic Manager - Housing Enabling & Delivery	<ul style="list-style-type: none"> Deliver up to 50 properties over the life of the strategy 	X	X	X
Improve the cost effectiveness of the homelessness provision of temporary accommodation.	Strategic Manager - Housing Enabling & Delivery	<ul style="list-style-type: none"> Revenue savings 		X	X
Take advantage of grant funding opportunities for the provision of housing.	Strategic Manager - Housing Enabling & Delivery	<ul style="list-style-type: none"> Maximise income from external grants 	X	X	X



Agenda Item Introduction

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Topic	CAPITAL PROGRAMME & CAPITAL STRATEGY

BACKGROUND

At the Corporate Scrutiny Committee meeting in May 2022 a scoping document was approved by the committee for an item on Capital Programme & Capital Strategy to be added to the workplan.

FOCUS FOR SCRUTINY

- How are risk profiles analysed, recorded, and reported?
 - Are there robust mechanisms in place to mitigate against risk?
 - How are decisions on the capital programme agreed?
 - What criteria are used for allocating money to capital projects?
 - Do such criteria link to corporate priorities?
 - How is the capital programme managed?
 - What documentation is available to show a clear and detailed audit trail of all decisions related to the capital programme?
 - Is there a long-term view of the Council's potential capital programme?
 - What slippage is there on the capital programme and what are the reasons for these?
 - How are local Members informed of capital projects in their divisions?
 - What steps have been taken over the past 3 years to improve the management of the capital programme?
-
- To develop practical proposals that achieve a reduction in the annual underspend of level of slippage in the capital programme.
 - To evaluate the council's existing capital investment criteria and propose improvements.
 - To identify improvements to the way in which the council manages the capital programme.
 - To identify changes required to the capital strategy.
 - To ensure that the Council's approach to the capital programme and supporting strategy accords with best practice, CIPFA guidance and National Audit Office.

APPROACH

A committee report to be provided.

DOCUMENTS ATTACHED

Appendix 1 - Capital Programme/Capital Strategy Scrutiny Report

Contact Point: Melanie White, Scrutiny Officer, ☎ 821000 ext 8876
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Committee report

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Topic	CAPITAL PROGRAMME / CAPITAL STRATEGY
Report of	DIRECTOR OF FINANCE AND SECTION 151 OFFICER

BACKGROUND

Overall Strategy

1. As described in the Medium-Term Financial Strategy (MTFS), the strategy is to maximise the capital resources available and then target the investment of those resources to areas that will enable the Council to meet its statutory responsibilities, stimulate the Island Economy and improve the Council's overall financial position.
2. The development of a Capital Strategy considers investments that will be made in the acquisition, creation, or enhancement of tangible or intangible fixed assets, in order to yield benefits to the council for a period of more than one year. It also considers how stewardship, value for money, prudence, sustainability and affordability will be secured. The Capital Strategy therefore has 3 core aims:

Aim 1 - To support a Medium-Term Outlook

- allocating known resources to future years for critical capital investment, ensuring that in years where capital resources are limited, critical investment can continue to be made;
- aligning known resources and spending, ensuring that uncertain or forecast resources are not applied to current investment, thus leaving potentially unfunded obligations in the future; and
- smoothing out any significant gaps between capital investment needs and capital resources available by utilising contributions from revenue.

Aim 2 - To Maximise the Capital Resources available and the flexibility of their application

- setting aside capital funding for "match funding" opportunities, where these are aligned with the Council's strategic objectives in order to take advantage of "free" funding;
- reviewing contractually uncommitted schemes against newly emerging capital investment priorities;
- avoiding ring-fencing of capital resources, except where such ring-fencing is statutory; and

- using prudential borrowing for "Invest to Save" schemes, or schemes which generate income.

Aim 3 - Targeted Capital Investment

- annual review of all contractually uncommitted capital schemes which rely on non-ring-fenced funding is undertaken to ensure that they remain a priority in the context of any newly emerging needs and aspirations;
- investment in programmes of a recurring nature that are essential to maintain operational effectiveness; and
- invest in specific schemes that:
 - have a significant catalytic potential to unlock the regeneration of the Island;
 - are significant in terms of the Council strategies that they serve;
 - are significantly income generating or efficiency generating; and
 - if not implemented would cause severe disruption to service delivery.

Prudential Borrowing

3. Prudential Borrowing is only available for a Council's "Primary Purpose for Investment" which must be "consistent with statutory provisions, proportionate to service and revenue budgets and consistent with effective treasury management practice".
4. The arrangements for Prudential Borrowing were strengthened in November 2020 and again in May 2022 and most recently in June 2023 following growing concerns over Local Government commercial property investments and taking on disproportionate levels of commercial debt to generate yield.
5. Borrowing for investments bought "primarily for financial return" (previously known as investment assets bought primarily for yield) is not permissible under the Prudential Code, as it does not constitute the primary purpose of investment and represents unnecessary risk to public funds.
6. Prudential Borrowing is available for "Invest to Save" schemes only where those savings must accrue directly to the Council on a sustained basis. Prudential Borrowing is governed by the Prudential Code and its associated tests of affordability, sustainability and prudence. Prudential borrowing is what is termed "unsupported borrowing" and means that the Government does not provide any revenue support through government grant for the repayment of that debt (neither principal nor interest).
7. The Affordability test dictates that the Council must be able to demonstrate that it can afford the debt repayments over the long term. Given the future forecast deficits of the Council, prudential borrowing is only available for Invest to Save schemes where there is a demonstrable case that the capital expenditure incurred will result in savings (i.e. cost reduction or additional income) that at least cover the cost of borrowing. Also, that those savings accrue directly to the Council and will be available on a sustained basis over the lifetime of any borrowing.

Responses to Specific Scrutiny Questions:

How are risk profiles analysed, recorded, and reported?/ Are there robust mechanisms in place to mitigate against risk?/ How is the capital programme managed?

8. Project managers within Directorates are assigned for each project. The Capital Programme progress is discussed at Directorate Service Boards where risks to delivery will be discussed and mitigating actions put in place. Risks relating to specific capital projects may form part of a Directorate's risk register.
9. The following risks relating to the council's overall capital programme are included in the Strategic Risk Register and are reported to the Audit Committee on a regular basis:
 - a. Strategic Risk 1 – Lack of financial resource and the ability to deliver the council's in-year budget strategy; and
 - b. Strategic Risk 2 – lack of financial resources and the ability to deliver the council's medium-term financial strategy
10. In addition, the performance of cumulative capital expenditure compared to the profiled budget is a measure reported to Cabinet within the quarterly performance management report (QPMR)
11. Finance staff will liaise with project managers to produce a monthly finance report for the whole capital programme which is presented to the Corporate Management Team and the Corporate Leadership Team
12. Quarterly Capital Reviews also take place with Finance to agree progress and any requirements to re-profile or address overspends.
13. There are also various Directorate Project Boards where specific capital projects e.g. ICT, Regeneration Boards are monitored and managed.

How are decisions on the capital programme agreed?/ What documentation is available to show a clear and detailed audit trail of all decisions related to the capital programme?

14. The proposed capital programme is developed using the aims of the capital strategy set out above as paragraph 2 and schemes are prioritised accordingly in order to make the best use of the modest resources available.
15. The approval of the capital programme is part of the annual Budget Report agreed by Cabinet and Full Council in February.

What criteria are used for allocating money to capital projects?/ Do such criteria link to corporate priorities?

16. See the aims of the capital strategy set out above at paragraph 2.
17. The main sources of capital funding are Government grants, other external grants, S106 funding, Corporate resources such as capital receipts and contributions from revenue budget both planned contributions and underspends transferred to the capital programme at year end and borrowing within the prudential framework.

18. If funding is via ring-fenced grants then this is allocated to the projects that meet the eligibility criteria e.g. Schools maintenance grants, Disabled Facilities Grants, Highways Grants.
19. Corporate resources are then applied to capital projects that are of the highest priority (see Aim 3 set out above at paragraph 2) i.e. that are essential to maintain operational effectiveness, have significant regeneration benefits, generate efficiencies and prevent severe disruption to service delivery such as health and safety schemes, ICT, and Fleet replacement.
20. Some government/external grants require match funding from the council which will be a call on Corporate resources, this is often prioritised as matched contributions can lever in significant amounts of external grant funding e.g. for coastal protection schemes.

Is there a long-term view of the Council's potential capital programme?

21. Please refer to the Capital Strategy as set out at paragraph 2 above.
22. The approved Capital Programme covers a 5 year forward view and will seek to allocate known resources to future years for critical capital investment ensuring that in all years where capital resources are limited, critical investment can continue to be made.
23. The rolling 5-year programme is reviewed annually to ensure that any contractually uncommitted schemes already in the programme are prioritised along with newly emerging capital investment priorities.

What slippage is there on the capital programme and what are the reasons for these?

24. Slippage in the Capital Programme does not mean that an underspend on a particular project has occurred, but that the budgeted spending forecast to take place in a particular financial year will now take place or extend into a subsequent year. The project will remain fully funded and the re-profiling of the budget will simply reflect that slippage has occurred and that spending will now take place at a later date than originally planned.
25. Slippage occurs for a variety of reasons often related to the contractors ability to deliver to the original timeframe due to a variety of factors including operational difficulties, weather and delay in obtaining permissions/licences required.
26. Slippage can also be a result of over-optimism in terms of project delivery planning.

How, are local Members informed of capital projects in their divisions?

27. Through the QPMR budget monitoring process which contains information across the full range projects within the capital programme.
28. Regeneration Place Plans for certain areas are in place which facilitates discussion about local capital projects and cabinet members also engage with local members about specific schemes in their areas.

What steps have been taken over the past 3 years to improve the management of the capital programme?

29. Improvement to the process of profiling expenditure over years. The spending profile is refreshed during the year following the quarterly review meetings with project managers and the revised current year programme is presented as part of the revised budget contained within the annual Budget Report to Cabinet & Full Council (although there still exists level of optimism bias in the delivery of capital schemes).
30. Additional focus is placed on inflationary cost pressures in the current economic environment.

BACKGROUND PAPERS

Budget & Council Tax Setting 2023/24 & Future Years Forecasts ([moderngov.co.uk](https://www.moderngov.co.uk))
[Capital Strategy 2023-24.pdf \(moderngov.co.uk\)](https://www.moderngov.co.uk/Capital%20Strategy%202023-24.pdf)

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Agenda Item Introduction

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Topic	PERFORMANCE MANAGEMENT FRAMEWORK

BACKGROUND

The Performance Management Framework was approved by Corporate Management Team in October 2021 and is due to be reviewed October 2023. The committee to consider a report on the lines of enquiry agreed at the Corporate Scrutiny meeting on 11 October 2022.

FOCUS FOR SCRUTINY

- To review the Council's Performance Management Framework before official refresh is due in October 2023.
- To review the Framework in line with how the Council currently reports on performance in the Quarterly Performance Reports submitted to Cabinet so to determine where improvements could be made.
- To ensure that a sound performance management framework exists so that performance reporting is consistent across the Council.
- To ensure that all appropriate areas of performance management are covered within the framework.
- To ensure that actions are taken on any area of poor performance

APPROACH

A committee report to be provided.

DOCUMENTS ATTACHED

Corporate Scrutiny Report – Performance Management Framework

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Committee report

Committee	CORPORATE SCRUTINY COMMITTEE
Date	11 JULY 2023
Title	PERFORMANCE MANAGEMENT FRAMEWORK
Report of	CABINET MEMBER FOR FINANCE, CLIMATE CHANGE AND BIOSPHERE

SUMMARY

1. At Corporate scrutiny committee in October 2022, a scoping document was approved by the committee for an item on the performance management framework to be added to the work plan. This report provides the committee members with an update on the research and findings to date and a programme of work to improve the performance management processes within the council service areas.
2. **KEY LINES OF ENQUIRY AND FOCUS FOR SCRUTINY**
 - To review the Council's Performance Management Framework before formal refresh is due in October 2023.
 - To review the Framework in line with how the Council currently reports on performance in the Quarterly Performance Reports submitted to Cabinet so to determine where improvements could be made.
3. **PURPOSE OF THE REVIEW AND REQUIRED OUTCOMES**
 - To ensure that a sound performance management framework exists so that performance reporting is consistent across the Council.
 - To ensure that all appropriate areas of performance management are covered within the framework.
 - To ensure that actions are taken on any area of poor performance.

BACKGROUND

4. **To review the Council's Performance Management Framework before official refresh is due in October 2023.**
 - 4.1 In order to review the Isle of Wight Council's current [performance management framework](#) officers have looked at a range of other local authority performance management processes to identify alternative methods of performance management and best practice. Officers reviewed case studies provided through the LGA for Bath and Northeast Somerset, Bristol, Cheshire West and

Chester, and Basildon Borough Council. Cornwall was also researched as a near neighbour comparator.

- 4.2 Some common themes exist across those councils which are already reflected in our practice but will be further reflected in the revised framework:
- Quarterly performance reporting takes place with reports to both Scrutiny and Cabinet
 - Performance management takes place at various levels of the organisation including both directorate and senior management level
 - Success has been achieved through ensuring senior management commitment
 - Dashboard reporting is used alongside traditional static reporting. Reports are published (often on external websites) to allow users to view the measures they are most interested in.
 - Indicators align with corporate/business plans and are regularly reviewed by service areas to ensure they remain current and relevant.
- 4.3 **We also reviewed the Local Government Association best practice guide to performance management for local authorities.**

[Performance management guide for local authority officers](#)

Some key messages we took from that include:

- Reporting should be at three levels: strategic, operational, and front line.
 - Performance improvements should foster trust and openness. Encourage feedback and make and learn from mistakes (no blame culture)
 - Senior buy-in is required for success (both process and culture)
 - Foster culture of curiosity and inquiry – continual improvement rather than seeing a measure as complete when target met.
 - Defined roles in performance management
 - Consistent use of data (to allow for historic and trend analysis)
 - RAG ratings and targets should be reviewed regularly
 - Benchmarking allows for comparison to wider environment
 - Follow SMART (specific, measurable, achievable, relevant, and timely) or FABRIC (focused, appropriate, balanced, robust, integrated and cost-effective) to develop indicators
 - Ensure citizen's perspective is included (resident satisfaction data, tools to monitor digital interactions)
- 4.4 The current framework generally follows the principles and themes that are identified above, there are changes that will be made to improve the framework and to reiterate the need for performance management across all areas of the council. However, the larger element that needs to be addressed is the process actually being used within service areas and the metrics and measures that are being reported.
- 4.5 This in itself will be required to be undertaken with service leads, to include a review of performance management process in each directorate and for those areas where this process needs refreshing a reintroduction of the reporting and

management. This process can be seen to best effect in the Adult Social Care and Housing Needs Directorate where reports are presented each month, dynamic reporting through dashboards is used alongside static reports and where targets and metrics are addressed formally with the managers responsible for the outcomes and delivery required.

5. To review the Framework in line with how the Council currently reports on performance in the Quarterly Performance Reports submitted to Cabinet so to determine where improvements could be made.

5.1 The performance indicators currently used in the QPMR were agreed by individual service areas to align with the corporate plan. Indicators are currently collected for both operational and frontline reporting and cabinet reporting (strategic) however emphasis is primarily on cabinet reporting indicators. There appear however, to be too many indicators that have been in place for some considerable time. There needs to be a full review of these and a streamlined reporting schedule that concentrates on the most important aspects of the council's business.

5.2 Whilst there is some directorate engagement with service plan metrics, this is not consistent, and the overall engagement with performance management at a strategic level is not consistently applied across all areas of the council. In general, there seems to be a level of disconnect between some services and their performance metrics this currently comes through as a lack of ownership often highlighted during the QPMR report preparation.

5.3 Performance Management and our use of data is also being addressed within the Isle of Wight Data Strategy but is currently in draft and will formulate our approach to accessing and using data to better inform our decisions.

5.4 QPMR currently takes approximately 3 months of preparation and review from collection of data to publication of the report for cabinet. Much of this time is spent chasing measure updaters or is caught up in the necessities of the democratic process.

5.5 Swot Analysis of current QPMR Process:

Strengths	Weaknesses
Multi-layer review ensures issues identified	Lack of buy-in from stakeholders at all levels results in delays in obtaining data from services
SharePoint allows collaborative working	Some metrics do not align with current processes or national reported metrics
Monthly breakdown of data allows for historic and trend analysis	Lack of regular review (metrics and targets)
	Current preparation and review of appendices is both time and resource intensive

Opportunities	Threats
<p>Cabinet changes and organisational restructure provide opportunity to review and refresh</p> <p>Power BI represents opportunity to speed up reporting and reduce duplication</p>	<p>The council's reorganisation will mean some activity reducing and may also remove key updaters</p> <p>Some reluctance to use of SharePoint currently prevents full collaboration across the council</p>

6. Proposed, updated QPMR process for 2023/24:

6.1 A full review of the performance management framework and process will be undertaken. This must also include a review of the indicators being collected against both Service Plans and the Corporate Plan to be effective and support good practice.

6.2 A review of the indicators will:

- Ensure indicators reflect changes to the organisation, policy, legislation, and national reporting frameworks
- Ensure indicators have appropriate targets/benchmarks set to enable better understanding of performance status and that RAG ratings, where used, are clear.
- Remove, where possible, duplication of work either by linking into systems or existing performance dashboards, or by using indicators that reflect other reporting methodologies already being completed
- Ensure indicators are relevant and not excessive and can be used to monitor against internal and external targets or benchmark against other authorities

6.3 Where it makes sense to do so, indicators will be published via Power BI dashboards, with full consideration of the differing requirements for directorate, service, and cabinet level reporting. Steps will be taken to secure data where necessary and ensure availability to the correct audiences.

6.4 Benefits include:

- Data will made available in a timely and consistent manner
- Dashboard usage (subject to use of the correct licences) will enable a tailored user experience, allowing focus on individual areas of interest
- Static reports can be created from dashboards where needed to overcome issues with licence availability.
- Risk management can be facilitated in dashboards alongside KPI's, enabling a 'one stop shop' for management overview
- CMT can review and engage with performance in a more timely and effective manner

- 6.5 Performance management should be brought back to the forefront of management decision making. Proper consideration of performance should be made at both CMT and directorate level. This requirement is already within the current performance management framework, there needs to be work with service areas to ensure this actually occurs in practice.
- 6.6 Given the proposals within the council's Reorganisation activity and the predicted update of the corporate plan it would be timely to make those QPMR and related changes when the new structures and teams have been put in place. To do that now would mean duplicating the work for elements that will change and activity that will cease. Therefore, it is proposed that this work will begin after the reorganisation review when teams and structures are in place and when the corporate plan refresh has been completed.

7. Next Steps

- 7.1 Apply the learning from other council's and the LGA best practice to the Isle of Wight Council performance management framework ready for the refresh prior to October 2023. Giving clear instruction on the need to apply the framework in to practice.
- 7.2 Work with directors and service updaters to streamline the metrics required for service level reporting (service boards / leadership meetings) and strategic reporting (QPMR).
- 7.3 Bring the reporting up to date and into the management teams, using the principles in the performance management framework. Link in with the corporate plan refresh, organisational change and develop reporting for Q1 of 2023/24.
- 7.4 Where possible and appropriate develop performance dashboards with service areas.
- 7.5 Deliver a refreshed, streamlined and current QPMR process and reporting outputs.

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