

Notice of a Meeting

Performance & Corporate Services Overview & Scrutiny Committee

Friday, 17 April 2026 at 10.00 am
Room 2&3 - County Hall, New Road, Oxford OX1 1ND

These proceedings are open to the public

If you wish to view proceedings, please click on this [Live Stream Link](#).
However, that will not allow you to participate in the meeting.

Membership

Chair: Councillor Glynis Phillips
Deputy Chair: Councillor Ian Middleton

Councillors: Brad Baines Dr Nathan Ley Roz Smith
Will Boucher-Giles Kieron Mallon
Tom Greenaway John Shiri

Date of Next Meeting: *12 June 2026*

For more information about this Committee please contact:

Committee Officer: *Scrutiny Team*
Email: *E-Mail: scrutiny@oxfordshire.gov.uk*



Martin Reeves
Chief Executive

April 2026

What does this Committee review or scrutinise?

The purpose of the Performance and Corporate Services Overview and Scrutiny Committee is (i) To review and scrutinise the performance of the Council and to provide a focused review of: (a) Corporate performance and directorate performance and financial reporting (b) Budget scrutiny (ii) To monitor the performance of the Council by means of effective key performance indicators, review of key action plans and obligations and through direct access to service managers, Cabinet Members and partners; (iii) To exercise the statutory right to call-in, for reconsideration, decisions made but not yet implemented by or on behalf of the Cabinet;

How can I have my say?

We welcome the views of the community on any issues in relation to the responsibilities of this Committee. Members of the public may ask to speak on any item on the agenda or may suggest matters which they would like the Committee to look at. **Requests to speak must be submitted to the Committee Officer below no later than 9 am 4 working day before the date of the meeting.**

About the County Council

The Oxfordshire County Council is made up of 69 councillors who are democratically elected every four years. The Council provides a range of services to Oxfordshire's 763,200 residents.

These include:

schools	social & health care	libraries and museums
the fire service	roads	trading standards
land use	transport planning	waste management

Each year the Council manages £1.2 billion of public money in providing these services. Most decisions are taken by a Cabinet of 10 Councillors, which makes decisions about service priorities and spending. Some decisions will now be delegated to individual members of the Cabinet.

About Scrutiny

Scrutiny is about:

- Providing a challenge to the Cabinet
- Examining how well the Cabinet and the Authority are performing
- Influencing the Cabinet on decisions that affect local people
- Helping the Cabinet to develop Council policies
- Representing the community in Council decision making
- Promoting joined up working across the authority's work and with partners

Scrutiny is NOT about:

- Making day to day service decisions
- Investigating individual complaints.

What does this Committee do?

The Committee meets up to 4 times a year or more. It develops a work programme, which lists the issues it plans to investigate. These investigations can include whole committee investigations undertaken during the meeting, or reviews by a panel of members doing research and talking to lots of people outside of the meeting. Once an investigation is completed the Committee provides its advice to the Cabinet, the full Council or other scrutiny committees. Meetings are open to the public and all reports are available to the public unless exempt or confidential, when the items would be considered in closed session.

If you have any special requirements (such as a large print version of these papers or special access facilities) please contact the officer named on the front page, giving as much notice as possible before the meeting

A hearing loop is available at County Hall.

AGENDA

1. Apologies for Absence and Temporary Appointments

To receive any apologies for absence and temporary appointments.

2. Declaration of Interests

See guidance note on the back page.

3. Minutes (Pages 9 - 28)

The Committee is recommended to **APPROVE** the minutes of the meeting held on 16 January 2026 and to receive information arising from them.

4. Petitions and Public Address

Members of the public who wish to speak on an item on the agenda at this meeting, or present a petition, can attend the meeting in person or 'virtually' through an online connection.

Requests to speak must be submitted no later than 9am three working days before the meeting, i.e. Tuesday 14 April 2026

Requests should be submitted to the Scrutiny Officer at scrutiny@oxfordshire.gov.uk.

If you are speaking 'virtually', you may submit a written statement of your presentation to ensure that if the technology fails, then your views can still be taken into account. A written copy of your statement can be provided no later than 9am on the day of the meeting. Written submissions should be no longer than 1 A4 sheet.

5. Customer Service Centre Update (Pages 29 - 36)

Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation, Susannah Wintersgill, Director of Public Affairs, Policy and Partnerships, Tom Parsons, Head of Customer Experience, Clare Martin, Strategic Improvement Lead, and Richard Merritt, Operational Manager Contact Oxfordshire have been invited to present a report on the Customer Service Centre.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

6. Devolution Update (Pages 37 - 80)

Kim Sawyer has been invited to present a report updating members on the latest developments from central government regarding Devolution.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

7. Community Asset Transfer Policy (Pages 81 - 146)

Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation, Vic Kurzeja, Director of Property and Assets, Michael Smedley, Head of Estates, and James Cater Clare Martin, Strategic Improvement Lead, and Richard Merritt, Operational Manager Contact Oxfordshire have been invited to present a report on

Community Asset Transfer Policy prior to its consideration by Cabinet.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

8. BMMR (Adult Social Care Focus) (Pages 147 - 154)

Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation, Councillor Tim Bearder, Cabinet Member for Adults, Karen Fuller, Director of Adult Social Services, Victoria Baran, Deputy Director of Adult Social Care, and Ian Bottomley, Deputy Director of Commissioning, and Kathy Wilcox, Head of Corporate Finance have been invited to consider the Business Management and Monitoring Report with a specific focus on Adult Social Care.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

9. Committee Action and Recommendation Tracker (Pages 155 - 164)

The Committee is recommended to **NOTE** the progress of previous recommendations and actions arising from previous meetings, having raised any questions on the contents.

10. Committee Forward Work Plan (Pages 165 - 170)

The Committee is recommended to **AGREE** its work programme for forthcoming meetings, having heard any changes from previous iterations, and taking account of the Cabinet Forward Plan and of the Budget Management Monitoring Report.

11. Responses to Scrutiny Recommendations (Pages 171 - 190)

Attached are the Cabinet response to the Performance and Corporate Services Overview and Scrutiny Committee reports on:

- BMMR – CEF Focus
- BMMR – Public Health Focus*
- Budget Proposals for 2026/27 to 2030/31
- Parking Permits*
- Social Value*

The Committee is asked to **NOTE** the responses.

* NB These responses are draft responses, which are scheduled to be signed off at Cabinet on 21 April.

Councillors declaring interests

General duty

You must declare any disclosable pecuniary interests when the meeting reaches the item on the agenda headed 'Declarations of Interest' or as soon as it becomes apparent to you.

What is a disclosable pecuniary interest?

Disclosable pecuniary interests relate to your employment; sponsorship (i.e. payment for expenses incurred by you in carrying out your duties as a councillor or towards your election expenses); contracts; land in the Council's area; licenses for land in the Council's area; corporate tenancies; and securities. These declarations must be recorded in each councillor's Register of Interests which is publicly available on the Council's website.

Disclosable pecuniary interests that must be declared are not only those of the member her or himself but also those member's spouse, civil partner or person they are living with as husband or wife or as if they were civil partners.

Declaring an interest

Where any matter disclosed in your Register of Interests is being considered at a meeting, you must declare that you have an interest. You should also disclose the nature as well as the existence of the interest. If you have a disclosable pecuniary interest, after having declared it at the meeting you must not participate in discussion or voting on the item and must withdraw from the meeting whilst the matter is discussed.

Members' Code of Conduct and public perception

Even if you do not have a disclosable pecuniary interest in a matter, the Members' Code of Conduct says that a member 'must serve only the public interest and must never improperly confer an advantage or disadvantage on any person including yourself' and that 'you must not place yourself in situations where your honesty and integrity may be questioned'.

Members Code – Other registrable interests

Where a matter arises at a meeting which directly relates to the financial interest or wellbeing of one of your other registerable interests then you must declare an interest. You must not participate in discussion or voting on the item and you must withdraw from the meeting whilst the matter is discussed.

Wellbeing can be described as a condition of contentedness, healthiness and happiness; anything that could be said to affect a person's quality of life, either positively or negatively, is likely to affect their wellbeing.

Other registrable interests include:

- a) Any unpaid directorships
- b) Any body of which you are a member or are in a position of general control or management and to which you are nominated or appointed by your authority.

- c) Any body (i) exercising functions of a public nature (ii) directed to charitable purposes or (iii) one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union) of which you are a member or in a position of general control or management.

Members Code – Non-registrable interests

Where a matter arises at a meeting which directly relates to your financial interest or wellbeing (and does not fall under disclosable pecuniary interests), or the financial interest or wellbeing of a relative or close associate, you must declare the interest.

Where a matter arises at a meeting which affects your own financial interest or wellbeing, a financial interest or wellbeing of a relative or close associate or a financial interest or wellbeing of a body included under other registrable interests, then you must declare the interest.

In order to determine whether you can remain in the meeting after disclosing your interest the following test should be applied:

Where a matter affects the financial interest or well-being:

- a) to a greater extent than it affects the financial interests of the majority of inhabitants of the ward affected by the decision and;
- b) a reasonable member of the public knowing all the facts would believe that it would affect your view of the wider public interest.

You may speak on the matter only if members of the public are also allowed to speak at the meeting. Otherwise you must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation.

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PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

MINUTES of the meeting held on Friday, 16 January 2026 commencing at 10.00 am and finishing at 4.06 pm.

Present:

Voting Members:

Councillor Glynis Phillips - in the Chair
Councillor Ian Middleton (Deputy Chair)
Councillor Brad Baines
Councillor Ron Batstone
Councillor Will Boucher-Giles
Councillor Tom Greenaway
Councillor Kieron Mallon
Councillor John Shiri
Councillor Roz Smith

**Other Members in
Attendance:**

Cllr Leffman, Leader of the Council
Cllr Fawcett, Deputy Leader of the Council and Cabinet
Member for Resources
Cllr Bearder, Cabinet Member for Adults
Cllr Gaul, Cabinet Member for Children and Young People
Cllr Gregory, Cabinet Member for Public Health and
Inequalities
Cllr Hannaby, Cabinet Member for Community Wellbeing
and Safety
Cllr Levy, Cabinet Member for Finance, Property and
Transformation
Cllr Roberts, Cabinet Member for Place, Environment and
Climate Change
Cllr James Barlow
Cllr Liz Brighthouse
Cllr Gareth Epps
Cllr James Fry
Cllr Emma Garnett
Cllr Robin Jones
Cllr Emily Kerr
Cllr Gavin McLauchlan
Cllr Susanna Pressel
Cllr James Robertshaw
Cllr Tony Worgan

Officers:

Martin Reeves, Chief Executive
Lorna Baxter, Deputy Chief Executive and Section 151
Officer
Ansaf Azhar, Director for Public Health and Communities
Annette Perrington, Deputy Director of Education and
Inclusion
Delia Mann, Deputy Director of Children's Social Care
Ian Dyson, Director of Financial and Commercial Services

Karen Fuller, Director of Adult Social Services
Kathy Wilcox, Head of Corporate Finance
Natalie Crawford, Capital Programme Manager
Paul Fermer, Director of Environment and Highways
Rob MacDougall, Chief Fire Officer and Director for
Community Safety
Robin Rogers, Director of Economy and Place
Susannah Wintersgill, Director of Public Affairs and Policy
Partnerships
Vic Kurzeja, Director of Property and Assets
Tom Hudson, Scrutiny Manager

The Council considered the matters, reports and recommendations contained or referred to in the agenda for the meeting and decided as set out below. Except insofar as otherwise specified, the reasons for the decisions are contained in the agenda and reports, copies of which are attached to the signed Minutes.

1/26 APOLOGIES FOR ABSENCE AND TEMPORARY APPOINTMENTS
(Agenda No. 1)

Apologies were received from Cllr Ley, substituted by Cllr Batstone.

2/26 DECLARATION OF INTERESTS
(Agenda No. 2)

Cllr Smith declared that her daughter worked for Oxfordshire Educational Services.

3/26 MINUTES
(Agenda No. 3)

The minutes of the meeting held on 05 December 2025 were **APPROVED** as a true and accurate record.

4/26 PETITIONS AND PUBLIC ADDRESS
(Agenda No. 4)

Cllr Robert Parker, Shirburn Parish, sent his apologies however the Chair agreed that his comments on the Watlington Relief Road should be read out by the Scrutiny Manager. (Full text is appended to these minutes)

Cllr Boucher-Giles arrived at this stage.

5/26 BUDGET PROPOSALS FOR 2026/27 TO 2030/31
(Agenda No. 5)

All Cabinet members and directors were invited to present a report on the Budget Proposals for 2026/27 – 2030/31.

Present for the item were:

- Cllr Leffman, Leader of the Council
- Cllr Fawcett, Deputy Leader of the Council and Cabinet member for Resources
- Cllr Bearder, Cabinet Member for Adults
- Cllr Gaul, Cabinet Member for Children and Young People
- Cllr Gregory, Cabinet Member for Public Health and Inequalities
- Cllr Hannaby, Cabinet Member for Community Wellbeing and Safety
- Cllr Levy, Cabinet Member for Finance, Property and Transformation
- Cllr Roberts, Cabinet Member for Place, Environment and Climate Change
- Martin Reeves, Chief Executive
- Lorna Baxter, Deputy Chief Executive and Section 151 Officer
- Ansaf Azhar, Director for Public Health and Communities
- Annette Perrington, Deputy Director of Education and Inclusion
- Delia Mann, Deputy Director of Children's Social Care
- Ian Dyson, Director of Financial and Commercial Services
- Karen Fuller, Director of Adult Social Services
- Kathy Wilcox, Head of Corporate Finance
- Natalie Crawford, Capital Programme Manager
- Paul Fermer, Director of Environment and Highways
- Rob MacDougall, Chief Fire Officer and Director for Community Safety
- Robin Rogers, Director of Economy and Place
- Susannah Wintersgill, Director of Public Affairs and Policy Partnerships
- Vic Kurzeja, Director of Property and Assets

All other Council Members were invited to attend as guests, those attending included:

- Cllr Barlow
- Cllr Brighthouse
- Cllr Epps
- Cllr Fry
- Cllr Garnett
- Cllr Jones
- Cllr Kerr
- Cllr McLauchlan
- Cllr Pressel
- Cllr Robertshaw
- Cllr Worgan

The Leader of the Council introduced the budget item explaining that the government's Fair Funding Review had resulted in a reduction of approximately £24 million in funding for Oxfordshire, creating a budget gap of £5.4 million for the current year. She noted that the Council had received a three year settlement, which was appreciated as it aided planning, whilst also noting the challenge of larger budget

gaps of £19.4 million and £25.9 million in the following two years. The Leader thanked Officers for their work in preparing the budget under tight timelines and emphasised the need to present a balanced budget and maintain the Council's strong financial position ahead of local government reorganisation.

Budget introduction

The Cabinet Member for Finance, Property and Transformation, stated that the Council faced an uncomfortable financial position, with a current budget gap of £5.4 million. He suggested future options to close the budget gap, including £1.5 million in real cuts to services, alongside other measures such as reducing contingency funds, though future years would present greater difficulties. The Cabinet Member for Finance, Property and Transformation noted that the government's multi year settlement was helpful but had come late and meant that the Council was effectively required to raise Council tax by the maximum amount, reducing its autonomy. He highlighted ongoing uncertainties, especially around funding for children with high needs and the accumulated deficit within the High Needs Block.

The Deputy Chief Executive and Section 151 Officer presented an overview of the budget, recapping the funding changes and the context for the current financial year. She explained that the budget setting process had been unusually challenging due to late and significant changes in government information. The Fair Funding Review consultation, which built on previous consultations, had only been completed in late November, with the provisional local finance settlement published just before Christmas. The Deputy Chief Executive and Section 151 Officer highlighted that the three year settlement was the first since 2016/17 and, while welcome for planning purposes, it still entailed funding reductions over the medium term.

She detailed the implications of the settlement. Transitional arrangements and resource equalisation across local authorities continued to affect funding, and the Council tax referendum principles remained unchanged, allowing a maximum increase of 4.99% per year. The Deputy Chief Executive and Section 151 Officer clarified that the government's calculation of core spending power assumed Council tax increases and a higher tax base growth than the Council's own forecasts, resulting in a real reduction in grant funding of £24.1 million over three years, rising to £29.3 million when other factors were considered.

She also addressed the Dedicated Schools Grant (DSG) and SEND deficits, noting new government expectations that local authorities would bear some of the financial burden, though the extent remained unclear. The Council planned to increase its contribution to the demographic risk reserve to £8 million per year to prudently manage the rising deficit, which was expected to reach £160 million by year end.

Councillors sought clarification on the authority's current level of borrowing, and the Deputy Chief Executive and Section 151 Officer explained that borrowing stood at approximately £420 million, representing under 5.5% of the Council's revenue budget. She emphasised that this remained within prudent limits, but any further increase would reduce the Council's flexibility to respond to emerging pressures. The Committee reflected on the importance of disciplined borrowing so that essential services were not compromised in future years.

There was also member interest in the drivers behind the lower than expected Council tax base growth. The Deputy Chief Executive and Section 151 Officer clarified that the main factor was a backlog in the Valuation Office, with around 2,000 homes in South and Vale awaiting banding. This administrative delay, rather than reduced housing completions or planning permissions, had temporarily suppressed growth. As these properties were added in future years, the tax base was expected to rise again.

Further clarification was provided around the proportion of unbanded homes within the tax base. Officers confirmed that the 2,000 properties represented approximately 0.8% of the total and that, had they been included, the Council would have exceeded its tax base growth target. They also confirmed that the Council tax surplus was expected to be slightly above £8 million, with no major concerns identified at that point.

A number of questions were asked about the DSG override and the implications of its potential removal. The Deputy Chief Executive and Section 151 Officer explained that Councils could not currently borrow to manage the DSG deficit unless government policy changed. The main impact for Oxfordshire was reduced cash balances and consequently lower interest income. Borrowing would only be required if reserves fell below safe levels. If the government removed the override, the Council would not need to borrow immediately, but any future expectation from government that Councils should cover the deficit would influence the medium term financial plan. These uncertainties, she noted, were the reason for proposing an increase to the demographic risk reserve.

Members expressed concern about the impact of reduced government funding and asked what evidence existed that all reasonable alternatives to a 4.99% Council tax rise had been explored. Officers confirmed that efficiency savings, reprioritisation exercises and prudent use of reserves had all been considered extensively, but that even after taking these measures into account, the full increase was still necessary. Not taking the maximum allowable rise would, they emphasised, have a compounding negative impact over future years.

The Head of Corporate Finance then summarised the Council's overall funding position. The budget deficit for 2026/27 was £5.4 million, rising to £19.4 million in 2027/28 and £25.9 million in 2028/29.

The Capital Programme Manager introduced the capital programme, noting that financial constraints continued to be challenging. She outlined statutory compliance, revenue generating schemes, cost avoidance initiatives, and key commitments such as highway improvements, active travel infrastructure, and energy efficiency projects. The programme had undergone a significant review, resulting in recommendations to reduce or return budgets, including £2 million from the East Oxford neighbourhood project, £7.1 million from the mortuary scheme, and £4.5 million from joint use agreements. Total available capital funding of £24.1 million was fully allocated to essential schemes, with some projects supplemented by Section 106 contributions.

During discussion, Councillors asked whether the Council's active travel related capital categories included the Watlington Relief Road. Officers confirmed that it did, noting that £3 million had been allocated within the broader category of schemes that encouraged active travel and town improvements.

There were also questions about the decision to remove £2 million from the East Oxford neighbourhood scheme. Some Councillors queried whether the Council was relying on additional Section 106 contributions to progress particular projects. Officers confirmed that this was not the case: the Council was seeking to use its own funding to unlock schemes where existing developer contributions were insufficient. While in theory it was possible to forecast how much Section 106 funding might be unlocked by the Council's £2 million allocation, officers explained that such forecasting required detailed programme work, which had not yet been undertaken.

The Committee also explored the rationale for reducing the mortuary budget by £7.1 million. Officers reported that the contract with the current provider had been extended, while discussions continued with NHS partners about a joint long term facility. In the short term, defined as the next five years, current capacity was adequate, although future growth would require investment.

Law and Governance

The Deputy Chief Executive and Section 151 Officer presented the budget proposals for resources, law, and governance. She outlined an ongoing financial pressure of £500,000 due to the continued reliance on legal locums, as well as increased costs associated with the coroner's service, including a £300,000 contract extension and a £100,000 adjustment to ensure pay parity with judicial scales. The committee noted that coroners, as judicial office holders, must be paid according to Judicial College and Senior Salaries Review Body guidelines. Additionally, she highlighted that an 8.3% increase in members' allowances has created a further financial pressure of £100,000.

Transformation, Digital, and Customer Experience

The Director for Property and Assets described a £300,000 ongoing cost for the new housing team, temporarily funded from the transformation reserve but expected to generate future savings. He also identified £250,000 of savings from reduced energy costs and a further £250,000 from facilities management efficiencies. The Director of Financial and Commercial Services explained the £800,000 investment in reorganised financial and commercial services, particularly procurement, with the expectation that equivalent savings would be delivered.

Councillors sought clarity on planned uses of the crisis and resilience fund. Officers explained that a detailed proposal would return to Cabinet in April. Last year, over half the fund had supported children eligible for free school meals during holidays and additional amounts had supported the resident support scheme. Members also asked how the Council maintained school meal quality without increasing prices despite food inflation. Officers confirmed that the service was subsidised, and that efficiencies, such as moving from fresh to frozen food, had enabled the Council to maintain standards.

The Director for Property and Assets then outlined several capital proposals, including £150,000 for works at the Kidlington Forum to support children's activities and staff moves, and £250,000 for fire crew housing upgrades driven by recent inspections highlighting issues with plumbing and boilers.

Questions were raised about the level of spending on IT consultants, and Officers explained that the majority of IT investment was operational, covering hardware refreshes such as laptops, migration to cloud systems to reduce data centre costs, cybersecurity improvements, and system integration. They emphasised that this programme was largely delivered in house and did not represent significant consultancy expenditure.

The Director of Public Affairs and Policy Partnerships, the Director of Financial and Commercial Services and the Director for Property and Assets left the meeting at this stage.

Public Health and Communities

The Cabinet Member for Public Health & Inequalities then introduced the Public Health and Communities budget. She noted that the public health grant was ring fenced and now part of a three year settlement, improving planning but still following a decade of real terms reductions. The Director for Public Health and Communities provided further detail, explaining that the grant covered statutory services including health checks, drug and alcohol treatment, and school nursing, which consumed about 80% of the budget. Public health also supported other Council functions where possible and contributed to capital investments across libraries and heritage, including significant Section 106 supported schemes.

The Committee discussed the relationship between the Marmot approach and the Council's public health resources. The Director for Public Health and Communities explained that becoming a Marmot county required systemic participation across all services, and that public health alone could not deliver the necessary reductions in inequality. He noted that although additional funding would help, the broader impact came from redesigning services across the Council and its partners.

Members also raised the potential for invest to save initiatives within public health. The Director for Public Health and Communities confirmed that many activities did have a demonstrable return, though these were often long term and benefits were frequently realised by partners such as the NHS. He gave examples including drug and alcohol services, the alcohol care team and the Move Together programme. He also addressed questions about deprivation, noting that although the most deprived had improved relative to the country, the gap deprivation gap remained large with some areas seeing deprivation worsen.

There were questions about whether Section 106 and CIL funds could support public health related infrastructure. The Director for Public Health and Communities confirmed that whilst these funds could not be used for service delivery, they could support facilities such as libraries and community hubs with public health value, and the Council should remain alert to such opportunities. Members also asked about the

reason for the concentration of library investments in the South and Vale districts. The Deputy Leader explained that this reflected both need, assessed by the libraries plan and local deprivation, and the availability of developer contributions, which varied by district.

The Chief Executive emphasised that while increased public health funding would be useful, it risked creating over reliance on public health teams rather than ensuring systemic change across the organisation. He stressed the importance of collaboration across services and highlighted that many benefits flowed to acute health services rather than the Council.

A question was raised about the absence of a specific budget line for climate change adaptation within public health. The Director for Public Health and Communities explained that although not explicitly listed, public health related climate interventions were ongoing across other departments, with strong collaboration on food strategy, air quality and active travel. He also confirmed that funding previously tied to homelessness and domestic abuse had been consolidated but that core activities were still being delivered.

Cllr Shiri left the meeting at this stage.

The Cabinet Member for Place, Environment and Climate Change, The Cabinet Member for Transport Management, The Director for Environment and Highways and The Director for Economy and Place joined the meeting at this stage. The Cabinet Member for Public Health & Inequalities left the meeting at this stage.

Environment and Highways

The Cabinet Member for Transport Management introduced the Environment and Highways budget. He explained that the aim had been to safeguard highway maintenance and park and ride fares amidst difficult financial conditions. The Director for Environment and Highways then elaborated on the pressures facing the service. Increased highway assets from new developments had raised maintenance costs, which were being offset through the use of commuted sums.

Similar approaches were being applied to network management, using permit income and reserves to cover new demands such as real time information displays and CCTV. Routine maintenance pressures relating to defects, lining and grass cutting could not be covered by reserves and required additional revenue, while increasing waste volumes were being partly supported by extended producer responsibility (EPR) funding.

The Director for Environment and Highways also described the growing costs of ash dieback, necessitating more extensive action and funding, and provided an overview of the fees and charges strategy.

Councillors questioned the decision to hold on street parking charges in Oxford City, noting the importance of encouraging park and ride use. Officers explained that charges served both behavioural and revenue functions, and that increases implemented in the previous year were still being monitored. A query followed about

the deteriorating slabs outside the Westgate shopping centre. Officers clarified that this issue lay outside the city centre regeneration budget and was being dealt with through joint arrangements with Westgate and Crown Estates.

Members sought further clarity on public realm improvements in market towns. It was agreed that such discussions were best held at locality meetings to allow Councillors to engage with specific local schemes.

There was also discussion of the use of Extended Producer Responsibility (EPR) funding. Officers explained that the first year had focused on one off projects, but once funding became ongoing it was incorporated into the base budget to manage increased disposal costs. They confirmed that EPR was ring fenced for waste services.

Questions were raised about emissions trading liabilities in the waste service. Officers confirmed that anticipated new burdens were included in the budget, alongside equally estimated grant funding. Councillors also queried the rationale for subsidising park and ride ticketing and whether similar subsidies could be extended to other bus routes. Officers highlighted the significant costs of general fare subsidies and referenced the recent "MyBus" scheme, which had greatly exceeded its budget.

Some members raised concerns about the £15 fee for non Oxfordshire residents at Household Waste Recycling Centres, particularly for residents living near county borders. Officers explained that the fee was competitive and aimed at covering service costs while avoiding higher charges seen elsewhere. Discussions with neighbouring authorities about reciprocal arrangements were ongoing.

A Councillor noted an omission in the fees and charges schedule relating to a previously agreed two hour parking charge in Zone 2, including Jericho. Officers acknowledged the oversight and agreed to correct it before finalising the budget. Members also explored differences between parking permit charges across the county. Officers confirmed that charges reflected local costs and that harmonisation was not planned. On street parking charges would continue to be set based on local demand patterns.

Further questions were asked about congestion charging, traffic filters and zero emission zones. Officers explained that each scheme operated within its own accounting envelope, with income and costs handled separately and surpluses kept in dedicated reserves. They confirmed that all schemes remained part of the work programme.

The Director for Environment and Highways then outlined the capital investment plans for Environment and Highways, including investment in public rights of way, bridges, the Oxford city centre regeneration programme, and public realm improvements in market towns. He highlighted the Quiet Lanes programme, investment in Wantage marketplace and the Watlington Relief Road, drainage network repairs, tree replacement and nursery development, essential HWRC maintenance, and land acquisition for a new Bicester recycling facility.

Cllr Mallon left the meeting at this stage.

The Watlington Relief Road prompted further debate, with Councillors questioning how it had become a Council project, why costs had increased and whether alternatives had been properly considered. Officers and cabinet members responded that the scheme had been established in previous growth deals and planning agreements, and that significant delays, many related to environmental objections, had increased costs. Alternatives such as HGV ANPR enforcement had been examined, but legal and practical barriers meant the relief road remained the only viable long term solution.

Drainage investment also drew scrutiny. Councillors noted that historic under investment had resulted in expensive repairs as gully clearing exposed widespread failures. Officers acknowledged that while the new £4 million allocation would help, it was not sufficient to address all problems. Some repairs, such as replacing undersized pipes, would be prioritised, but national lobbying for increased capital funding would still be required.

Questions continued regarding the Oxford city centre regeneration budget. Officers clarified that the line item included delivery of the Cornmarket and Queen Street projects, while a separate public realm line focused on improvements along major routes such as the approach from the station. Councillors also asked about the status of Local Cycling and Walking Infrastructure Plans (LCWHIPs). Officers explained that the Council was completing LCWHIPs across the county before updating existing ones, including the Oxford LCWHIP, which was due for review.

Cllr Shiri rejoined the meeting at this stage. The Cabinet Member for Transport Management, Cllr Boucher-Giles, and the Chief Executive left the meeting at this stage.

Economy and Place

The Cabinet Member for Place, Environment and Climate Change introduced the Economy and Place budget, emphasising investment in the rail strategy, which was essential to the county's long term transport plan and broader aims of supporting sustainable travel. They also highlighted the £2 million allocation for Section 106 related projects, noting that this had reduced slightly due to limited new schemes coming through the pipeline after previous successful years.

The Director for Economy and Place added that the budget supported economic development and infrastructure planning, including the strategic use of enterprise zone funding. He referred to preparations for local government reorganisation and potential devolution, and to ongoing investment in flood resilience, including grants for town and parish Councils and recruitment of more flood wardens. Work on business cases within the OXRAIL 2040 plan also continued.

The Committee discussed concerns about outdated drainage infrastructure and the impact on flooding. Officers confirmed that while proactive measures were being taken, the scale of the required upgrades exceeded available funds. Some issues identified in Section 19 flood investigations fell within the remit of other agencies such as Thames Water, highlighting the need for joint working and national lobbying.

There were also questions about the rationale for allocating significant revenue to strategic planning in advance of any future strategic authority or mayoral model. Officers explained that recent legislation required principal authorities to prepare spatial development strategies even without devolution, and regulations were expected soon. Early investment would place the Council in a stronger position and reduce delays if new structures came forward.

Members then asked about discussions with other upper tier authorities in the Thames Valley about pooling resources for strategic planning. Officers confirmed that conversations were underway, with chief executives and directors meeting recently to explore collaboration in sharing evidence and preparing for potential regional strategies.

The Cabinet Member for Place, Environment and Climate Change, The Director for Environment and Highways and The Director for Economy and Place left the meeting at this stage. The Chief Executive rejoined the meeting at this stage.

The Committee adjourned at 13:20 for lunch and reconvened at 14:00.

Fire and Community Safety

The Director for Community Wellbeing and Safety introduced the budget proposals for Oxfordshire Fire and Rescue Service. Chief Fire Officer and Director for Community Safety outlined key pressures facing the service. He explained that a government grant introduced after the Grenfell Tower disaster had previously supported the Fire Protection team, but the reduction in this grant created a budget challenge. Additional pressures stemmed from rising ill health and injury costs for firefighters, increased expenditure on PPE, and the impact of contract inflation on the fire engine replacement programme. A national programme to upgrade mobile communications across emergency services was expected to create both one off and ongoing costs.

Councillors explored whether discretionary fees could generate more income. Officers explained that most charges in the fire service were statutory and set nationally, limiting opportunities for additional revenue. Questions were also raised about coordination between Council services and health regulators. Officers noted that collaboration had strengthened significantly, with shared initiatives across public health, tobacco control and physical activity contributing to improved outcomes. Members sought reassurance about preparations for local government reorganisation. Officers and Councillors described ongoing work on strategic planning, economic development and infrastructure to ensure a smooth transition. They emphasised that early preparation was crucial for future success.

There were also questions about whether penalties imposed for inspection failures covered the full cost of inspections. Officers explained that statutory fees and penalties were nationally set and did not necessarily reflect the actual cost to the Council. As a result, the fire service often absorbed additional unfunded costs. Members asked about the impact of recent government consultation processes. Officers confirmed that the budget had been prepared using confirmed information

and had not incorporated potential changes from consultations whose outcomes were unknown.

The Director for Community Wellbeing and Safety and Chief Fire Officer and Director for Community Safety left the meeting at this stage

Adult Social Care

The Cabinet Member for Adults opened the discussion on the Adult Social Services budget. He noted that services had undergone significant cuts since 2021, driven by national funding changes, and that while many savings had been achieved through redesigning services, few easy options remained.

Director of Adult Social Services expanded on the financial pressures. Updated demographic modelling had brought a slight improvement, but inflation was expected to add £5.6 million to care package costs. Additional pressures included the failure of the previous community equipment provider and increased costs for learning disability contracts. High cost placements for young people transitioning to adult services would increase expenditure by a further £3.6 million, though efforts to secure efficiencies through contract reviews and in house provision continued.

Councillors asked about residential care fee levels. Officers explained that the budget included an uplift to ensure sustainability in the market and alignment with inflationary and workforce pressures. Questions followed about whether collaboration with other authorities could deliver savings. Officers confirmed ongoing work on joint commissioning and shared services, recognising the importance of economies of scale.

There was also discussion about the allocation of Section 106 funding within adult social services. Officers emphasised strict compliance with legal agreements and confirmed that any changes in allocation were reviewed by legal and planning teams. Councillors asked whether current money saving initiatives were sufficient for long term sustainability. Officers responded that while efficiency measures were important, long term stability required national reform of adult social care funding.

Members raised concerns about increasing delays in hospital discharge and their impact on social care. Officers acknowledged significant pressure on resources, explaining that reablement and community care services were working closely with the NHS to address backlogs. Questions were also raised about the need for additional in house accommodation. Officers confirmed that demand was rising and that further investment was being explored, although such expansion required significant capital.

The Cabinet Member for Adults and Director of Adult Social Services left the meeting at this stage.

Children, Education and Families

The Cabinet Member for Children and Young People introduced the Children's Services budget. The Deputy Director of Education and Inclusion described the

escalating costs facing the service due to national reforms and rising demand, particularly in children's social care and SEND services. High cost placements had increased, with average placements costing over £400,000 per year, and efforts to reduce expenditure through kinship care and fostering had not delivered the anticipated savings. A shortage of educational psychologists and the need for additional casework and agency staff created further pressures. The service planned to manage demand, improve recruitment and retention, and draw on a £3.1 million increase in the Children, Families and Youth Grant to offset challenges where possible.

Councillors sought more detail on the 100% adjustment for savings, asking why it was required. Officers explained it reflected the need to fully deliver planned savings in a climate of rising pressures, including high cost placements now averaging over £100,000 per year. Members also queried expanding in house children's homes to reduce external costs. Officers said this was being explored, but required significant upfront investment, specialist staffing, and suitable premises.

Members queried the £2.6 million expenditure at Woodeaton, including whether the sale of the old building might offset costs. Officers confirmed that disposal of the old site was being considered and that ongoing costs would depend on staffing, maintenance and service delivery at the new facility. Concerns were also raised about school meal budgets, with Officers confirming that costs depended on uptake; although some eligible families did not claim free school meals, the Council encouraged all to apply despite the budgetary implications.

Questions were also asked about savings associated with reducing agency staff. Officers expressed cautious optimism that recruitment improvements would support these savings, though challenges remained. SEND transport costs also generated discussion. Officers explained that rising demand, increased complexity and longer travel distances were all contributing factors, and that routes, policies and independent travel training were being reviewed to manage costs.

Finally, members sought clarity on the SEND deficit and recent government statements. Officers reported that government had indicated that Councils would not be expected to cover the deficit from their general funds, with future support coming from departmental spending limits. However, details remained unclear and posed continued uncertainty for financial planning.

The Committee **AGREED** to the following actions:

- Officers would report back to the Committee, how many parking spaces each individual market town has compared to how many parking spaces Oxford city has.
- Officers would re share the justification and plans for the Watlington relief road, to explain how the Council have arrived at the current plans.

The Committee **AGREED** to recommendations under the following headings:

- That greater detail of the contribution non Public Health areas make to the Council's Marmot agenda is provided within the Council's budget report, particularly in relation to mitigating the negative health impacts of climate change.
- That 2 hour parking in Oxford City in Zone 2 is included within the list of fees and charges in the Council's budget report.
- That Council is provided with the options appraisal used when assessing to progress with the Watlington Relief Road as part of the budget report.
- That plans for Public Realm Improvement expenditure are brought to members at Localities meetings.
- That the Council writes to the Valuation Office Agency to raise the issue of 2000 homes without council tax bands.
- That the Council collates and reviews direct feedback from children, where available, from schools, concerning the quality of current school meals.

6/26 SOCIAL VALUE POLICY (Agenda No. 6)

Cllr Levy, Cabinet Member for Finance, Martin Reeves, Chief Executive, Ian Dyson, Director for Financial and Commercial Services, and Max Button, Commercial Excellence Lead, were invited to present a report on a draft of the refresh of the Council's Social Value policy.

The Cabinet Member and Officers introduced the Social Value Policy by outlining its purpose and the strategic direction it would set for Oxfordshire County Council. The Cabinet Member for Finance emphasised that the policy sought to ensure the Council's procurement and commissioning activities delivered benefits that extended beyond strict financial return. The intention was to embed social value into all contracts so that local priorities, such as sustainability, inclusion, and economic development, were actively supported through public spending. By positioning social value at the centre of procurement, the Council aimed to strengthen community outcomes and promote long term wellbeing for residents.

The Director for Financial and Commercial Services discussed how the policy would operate in practice. He explained that it would provide a clear framework for Officers, enabling consistent assessment and maximisation of social value within procurement processes. The policy was designed to ensure Officers had accessible guidance, measurable outcomes and transparent evaluation methods, so that consideration of social value became a routine element in decision making. He noted that embedding these principles required sustained cultural change, supported through training and ongoing oversight.

The Commercial Excellence Lead added that the policy would strengthen the Council's ability to work constructively with suppliers and partners, encouraging innovation and collaboration. He highlighted that meaningful social impact depended

on strong relationships and the ability to track, monitor and report on commitments. Building a cycle of continuous improvement was essential, ensuring that the policy delivered real change rather than becoming a procedural formality.

During discussion, members raised concerns that social value risked being interpreted too narrowly if seen purely as a procurement exercise. They pointed to County Durham's "Durham Pound" as an example of a wider approach that considered the full range of a Council's activities and assets, including land and property. Members questioned why the current policy focused exclusively on procurement when social value could be embedded more broadly across Council functions.

In response, Officers acknowledged that while procurement was the initial focus, the wider potential was recognised. They agreed that future iterations of the policy should expand to include broader applications of social value, particularly in the context of forthcoming local government reorganisation. The Chief Executive reinforced this point, cautioning against a narrow interpretation and encouraging a more ambitious, place based model aligned with strategic county wide priorities.

Further questions explored how work on social value beyond procurement would be captured within Council processes. Officers confirmed that the current version of the policy did not yet cover this wider scope but recognised the need for a more holistic approach that integrated social value considerations into land management, property decisions and other operational were. Members expressed support for developing a more comprehensive strategic framework to ensure that social value was embedded across all directorates.

The Committee also examined the application of the policy to tenders over £100,000. Members were concerned that the requirements might inadvertently discourage smaller local businesses from bidding, particularly if the process became overly complex. Officers stressed that the policy had been designed to be proportionate, with expectations scaled to the size and nature of contracts. They reiterated that supporting small and medium sized enterprises (SMEs) was a key priority and confirmed that the impact on smaller suppliers would be monitored to ensure the policy remained accessible and fair.

Questions were then raised about the Council's ability to respond when suppliers failed to deliver on their social value commitments. Officers explained that these commitments formed part of the contractual obligations, enforceable through standard contract management processes. Where delivery fell short, the Council could require remedial actions, withhold payments, or ultimately terminate the contract. Members stressed the importance of clear expectations, strong monitoring, and robust contract management to uphold accountability and secure meaningful outcomes.

The meeting concluded with discussion on how environmental sustainability objectives were embedded within procurement. Officers confirmed that sustainability was a core strand of the policy, with tenders required to demonstrate how they would contribute to carbon reduction, resource efficiency and wider climate action priorities. Members emphasised that environmental goals must be integrated throughout the

contract lifecycle, from tender design through to delivery and evaluation. There was collective agreement that the Council should continue strengthening its approach to ensure alignment with corporate climate ambitions and to promote high quality, sustainable practice among suppliers.

The Committee **AGREED** to finalise their recommendations offline, with the broad topics to relate to:

- Consideration of having a light touch set of social value requirements for smaller contracts
- Increasing the social value options with regards to climate change measures
- Having targets and proven, impactful projects which focus on the key priorities the Council would like to address in relation to social value
- Having the procurement element of social value be more explicitly aligned with the rest of the Council's approach, and to work towards bringing the Council's approach into alignment with other local anchor institutions.

7/26 COMMITTEE ACTION AND RECOMMENDATION TRACKER

(Agenda No. 7)

The Committee **NOTED** the action and recommendation tracker.

8/26 COMMITTEE FORWARD WORK PLAN

(Agenda No. 8)

The Committee **AGREED** to the proposed forward work plan, with the following inclusions:

- Social Value policy within a year
- Public Health equality report would return in Dec 2026

Members were also encouraged to send additional suggestions to the Scrutiny Manager.

The Committee expressed desire for a ICB representative to attend the Adult Social Care focused BMMR item in April.

9/26 RESPONSES TO SCRUTINY RECOMMENDATIONS

(Agenda No. 9)

The Committee **NOTED** the cabinet responses to the Devolution report.

..... in the Chair

Date of signing

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Item 5 Budget Proposals for 2026/27 to 2030/31

Shirburn Parish is a key stakeholder in the Watlington Relief Road scheme promoted by the County Council. It is proposed to allocate £14.1m of corporate funds in the council's draft 2026/27 budget so the project can progress.

Shirburn Parish has Grade I & II Listed heritage assets of national and historic importance. The parish would be negatively impacted by the proposed relief road and objects to the council's planning application.

We are grateful for the opportunity to raise that the Performance & Corporate Services Overview & Scrutiny Committee has insufficient information to support the allocation of £14.1m from the council's corporate funds to the WRR project.

The council's finance officers have confirmed the criteria for securing firm corporate funds for capital projects.

£14.1m is proposed from corporate funds on the basis the council would seek further funding from other sources, S106, CIL to mitigate the value of OCC funds required to support the scheme. The council has proposed to use its funds to enable the scheme to proceed subject to planning approval. However further S106 funding will be sought to replace this corporate funding as far as possible in order to maximise the overall funding available for the capital programme.

The Committee has no details on any further funding that the council has identified could be recouped by the council investing £14.1m corporate funds in this scheme. Nor does the Committee have a firm go live date when construction will commence for inclusion in the council's firm 2026/27 capital programme.

The funding criteria for corporate funds was not understood when councillors considered the 2025/26 budget. The funds were assumed to be largely secured from developer contributions, which is not the case. The funding decision in 2025/26 was also made without information that the scheme is technically challenging to build. The council recently revealed it is a "complex infrastructure project".

The WRR is labelled as to "encourage and facilitate active travel and improve Oxfordshire towns". The scheme is more than doubling capacity for motor traffic. It does not contribute to the council's policy to reduce private car trips. Watlington is not a town in the way Wantage or Abingdon are and it does not have a marketplace or market square

These are important matters that concern very large sums of scarce public monies. We ask the Performance & Corporate Services Overview and Scrutiny Committee to recommend removing corporate funds from the WRR and reallocate these funds where they will maximise the overall funding available for the capital programme and deliver the council's corporate plans and policies, and to recommend an immediate review of council recommended low cost alternatives at Watlington.

R Parker, Chair
Shirburn Parish

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PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

17 April 2026

CUSTOMER EXPERIENCE SERVICE UPDATE

Report by the Director of Public Affairs, Policy and Partnerships

RECOMMENDATION

1. **The Performance Scrutiny Committee is RECOMMENDED to:**
 - a) Consider and note the current performance of the Customer Experience service;
 - b) Consider and note the impact of recent service redesign and digital transformation activity.

Executive Summary

2. This report provides an overview of the Customer Experience service, including its role within the council, current performance, staffing and structure, use of digital and artificial intelligence, call volumes, and the handling of complaints.
3. Customer Experience plays a critical role as the council's main point of contact with residents, handling high volumes of enquiries across a wide range of services. The service has recently undergone a redesign and has begun implementing digital and AI-enabled tools, including web and voice bots, to improve customer access, manage demand and increase efficiency.
4. Early evidence indicates that these changes are improving customer journeys, reducing avoidable demand on frontline staff, and allowing resources to be focused on more complex cases.

Overview of the service

5. The Customer Experience service is responsible for managing how residents contact and interact with Oxfordshire County Council. It acts as the council's primary 'front door', supporting access to services through phone, digital and written channels, and ensuring enquiries are directed to the right service first time wherever possible.
6. The service provides contact handling on behalf of a number of services, including Adult Social Care and the Highways team. In addition, it manages corporate complaints, statutory complaints, Freedom of Information (FOI) requests and correspondence from MPs, providing a consistent approach to customer feedback.

7. The service moved into the Resources directorate under Public Affairs, Policy and Partnerships in January 2026 following the restructuring of services within Transformation, Digital and Customer Experience. This is a temporary move until the new Director of Technology and Customer Experience joins the council later in the spring.

Service structure and redesign

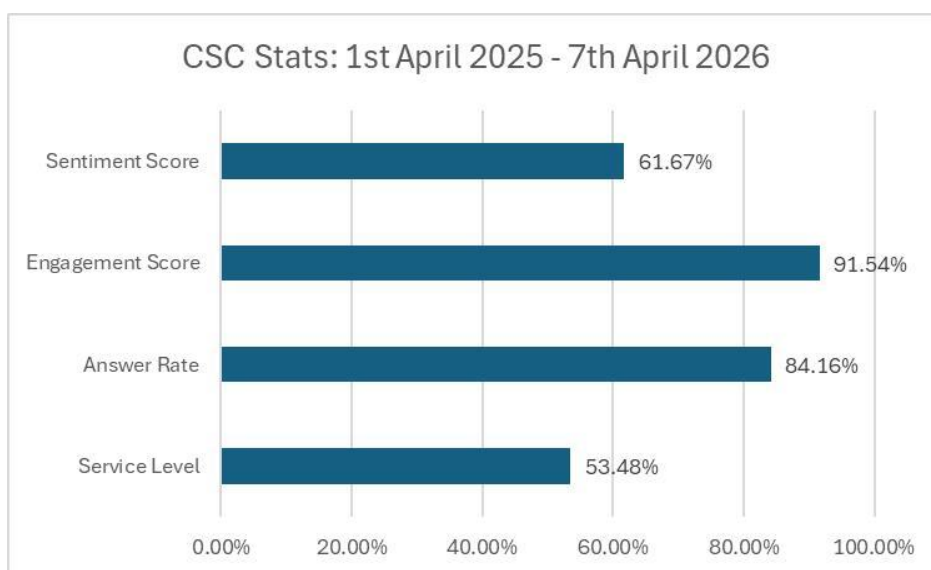
8. In late 2025 Customer Experience underwent a service redesign, with the new structure going live on 1 February 2026. The structure is split into teams delivering specific services that can flex to adapt to demand; it is also designed to be scalable to adapt to local government reorganisation.
9. The service comprises three core functions:
 - i. Operations, which includes the Customer Service Centre
 - ii. Customer Feedback, covering complaints, Freedom of Information requests and MP enquiries
 - iii. Strategic Improvement, responsible for delivering the Customer Experience Strategy and digital transformation roadmap, working closely with digital partners such as Zoom.
10. As part of the redesign, the service looked to consolidate all operational resource in one area, with workforce planning moving under the customer service centre manager and working closer with operational teams. This helps the team better plan for seasonal peaks, such as school admissions, and ensure continuity of service.
11. All roles in Customer Experience were recruited from within the service. This is in line with a wider commitment from Customer Experience to train, develop and provide progression opportunities to the existing team.
12. The new structure is now embedded and working well. Since go-live, the customer contact centre has responded well to the annual spike in school admissions calls by cross-skilling and bolstering resource in the team.

Staff Wellbeing and Engagement

13. In Q3 2025/26 Customer Experience recorded an average absence rate of 2.36 days per full-time equivalent (FTE), slightly below the council average of 2.64 days per FTE. The most common reasons for absence in Q3 2025/26 were colds and flu. Mental health and stress related absences were the fourth and fifth most common reasons for absence.
14. The service experienced an average turnover rate of 11 per cent in 2025, marginally higher than the council average. This is in line with customer contact centres globally, whose turnover rates are higher than other sectors.
15. However, the majority of leavers moved into other roles within the council, reflecting the transferable skills developed within the contact centre and supporting organisational retention.

16. Engagement survey results at directorate level indicated positive views on work-life balance, alongside a desire for clearer development and progression opportunities. The results, published in December 2025, covered the whole directorate (Transformation, Digital and Customer Experience), with no subset available for individual services.
17. Many of those leaving Customer Experience progress within the organisation after developing their skills and gaining experience supporting residents. But the service will continue to ensure development opportunities are in place and progression pathways made clear to colleagues.

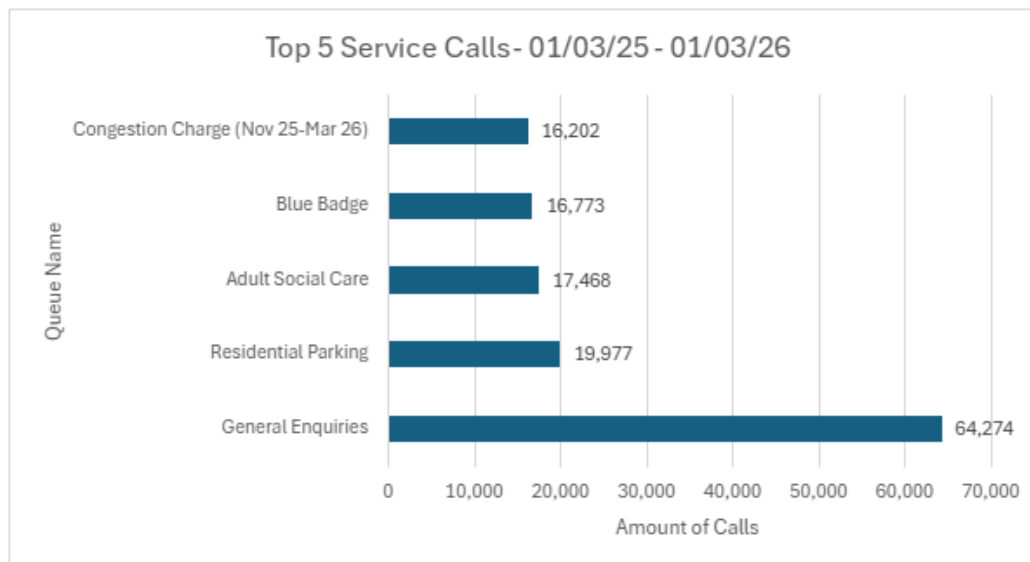
Key Performance Indicators



18. The Customer Service Centre uses four key metrics to measure performance. These are:
 - i. **Sentiment Score:** this reflects how positive or negative customers' interactions are overall, based on language, feedback or survey responses. A higher score indicates more positive customer experiences.
 - ii. **Engagement Score:** this measures how effectively customers are engaging with the service (for example, staying on the line, using self-service properly, or completing interactions). A high score suggests customers are generally able and willing to engage.
 - iii. **Answer Rate:** this shows the proportion of customer contacts that are successfully answered, whether by an advisor or an automated service. A higher rate means fewer contacts are missed.
 - iv. **Service Level:** this measures how quickly contacts are answered against a defined target (for example, within a set number of seconds). A lower score indicates pressure on capacity or peak demand impacting response times.

Call volumes and demand

19. Customer Experience handles very high call volumes across multiple services. The highest-volume areas include General Enquiries, Residential Parking, Adult Social Care, Blue Badge and the temporary congestion charge.



*Congestion charge line started in November 2025

20. Call volumes about blue badges are generally driven by a delay in applications being processed. Following the introduction of the temporary congestion charge, there has been a marked increase in the number of applications for blue badges, many of which do not meet the eligibility requirements. The service continues to manage this demand while working with the communications team to improve customer information and reduce avoidable contact.

Use of Digital and Artificial Intelligence

21. In line with the Customer Experience Strategy, the service is increasingly using digital platforms and AI to improve access, manage demand and deliver efficiencies.
22. Within the contact centre, AI is used to record, transcribe, summarise and categorise all calls, significantly reducing post-call administration. AI is also used to support faster training of new starters through agent assist and knowledge bases.
23. The service is using AI to improve access to services for customers. It enables them to contact the council on a channel and at a time that is convenient for them, including outside normal operating hours. Customers always retain the option to speak to a live advisor.
24. A web chat bot was recently piloted for the temporary congestion charge. In its first month, 1,819 customers interacted with the bot, asking 3,772 questions, with only 5 per cent escalating to a live advisor. This represents a significant channel shift, with customers choosing self-service over phone contact. The

top three topics were: the location of the congestion charging points; how to pay for a PCN; and whether the customer had been through a congestion charging point.

25. The use of the web chat bot represents a channel shift, with customers choosing to have questions answered by the bot, rather than calling or searching the website independently. The service is planning to roll out chat bot technology for highways enquiries and school admissions over the first quarter of 2026/27.
26. A voice bot was launched on 25 March 2026 to replace traditional phone menus. The voice bot uses natural language models to understand the intent behind each call. This means that, instead of navigating long button-press menus, callers can simply explain in their own words what they are calling about, and the voice bot routes them to the right service or provides the information they need.
27. The voice bot was thoroughly tested before launch to ensure accessibility. This included testing with a local community group My Life My Choice from an accessibility and user experience perspective.
28. Early indications show an average 55 per cent reduction in switchboard calls following the launch of the voice bot, equating to a potential reduction of over 35,000 calls per year.
29. The service's digital roadmap includes the wider utilisation of voice bots to answer questions, thereby shortening the average call length with an advisor or completely negating the need for a call with an advisor, and enabling customers to access a wide range of information outside of normal operating hours.
30. The service is committed to driving digital transformation to improve customer access and reduce operating costs. However, it is recognised that some customers will prefer to call the council and this function will continue to be available. A greater proportion of customers who opt to use digital channels and self-serve will mean those customers who need to call will be able to get through to someone more quickly.

Complaints

31. The customer feedback team handles corporate and statutory complaints, freedom of information requests (FOIs), and enquiries from MPs. The team supports services by triaging complaints, applying the correct legislation and process, and advising on handling and timescales. The team reviews and quality-assures responses before they are issued, and ensures learning is identified and actioned where complaints are upheld.
32. Corporate complaints have two stages. At Stage 1, the service investigates the complaint and provides a written response explaining what happened and any action taken. If the complainant remains unhappy, they can request Stage 2, which is a review of the Stage 1 response and how the complaint was handled.

33. Children's statutory complaints have three stages. Stage 1 is local resolution by the service. If issues remain unresolved, Stage 2 involves an independent investigation with formal findings and recommendations. Stage 3 is a review panel that considers whether the Stage 2 investigation was fair and thorough.
34. Adult Social Care statutory complaints have two stages. Stage 1 is investigated by the service. If the complainant remains dissatisfied, the complaint can request a review, this is then reviewed at a more senior level.

Formal complaints overview (Q1–Q3 2025/26)

35. The council received 615 formal complaints during Q1-Q3 2025/26 through its corporate and statutory complaints procedures. These comprised 443 corporate complaints (Stages 1 and 2), 86 Children's statutory complaints (Stages 1–3), and 86 Adult social care statutory complaints. Complaints were raised primarily within Education (SEND), Children's Social Care, and Adult Social Care, reflecting their complexity and statutory nature.
36. Across all formal complaints, the most common issues were:
 - allegations of service failure or poor service quality
 - delays in statutory processes
 - lack of communication or follow-up.
37. Within Education and SEND, complaints frequently relate to statutory timescales, availability of suitable provision, and ongoing communication with families. In Children's Social Care, complaints tend to focus on decision-making, assessments and social work practice. Adult Social Care complaints are more evenly spread, but often relate to assessments, charging decisions and the quality or continuity of care.
38. Of the formal complaints closed during the period:
 - 301 (49%) were upheld or partially upheld
 - 173 (28%) were not upheld, and
 - a small number were resolved informally following investigation.
39. The relatively high upheld/partially upheld rate, particularly within Education/SEND, indicates that complaints remain an important mechanism for identifying learning and service improvement.
40. Overall, the council is getting better at investigating complaints and identifying learning, but timeliness remains an area for improvement. The customer feedback team is working closely with services to improve timeliness and support more consistent handling of complaint responses:
 - Education/SEND: 113 out of 169 on time (67%)
 - Children's Social Care (stage 1): 28 out of 56 on time (50%)
 - Adult Social Care: 80 out of 94 on time (85%)

Complaints about Customer Experience

41. During Q1–Q3 2025/26, there were 15 formal corporate complaints relating to Customer Experience. The majority of complaints related to high volume transactional services, including Blue Badge, Residential Parking Permits and Concessionary Bus Passes, with a small number relating to the customer feedback team.
42. The main issues raised concerned service delivery and communication :
 - Blue Badge: 6
 - Customer Feedback Team: 4
 - Residential Parking Permits: 3
 - Concessionary Bus Passes: 2
43. The majority of complaints were resolved informally or not upheld, with only a small number upheld or partially upheld. It is also important to note that Customer Experience actively resolves most customer dissatisfaction through service requests and early intervention, rather than formal complaints. Many issues raised by residents are transactional in nature and can be addressed quickly by the service without the need to escalate into the formal complaints process. This supports quicker resolution for customers and contributes to the low volume of formal complaints recorded in this area.
44. Overall, the data shows that Customer Experience has low complaint volumes despite very high levels of customer contact.

Financial Implications

45. There are no direct financial implications arising from this report. The Customer Experience service operates within approved budgets. Recent service redesign activity and the introduction of digital and AI-enabled tools, including web and voice bots, have been delivered within existing resources. These initiatives are intended to support demand management, reduce avoidable contact and improve efficiency over time, contributing to financial sustainability rather than creating new cost pressures.

Any future changes with material financial implications would be subject to separate approval through the council's established budget and governance processes.

Comments checked by:

Drew Hodgson

Strategic Finance Business Partner – Resources

Legal Implications

46. There are no direct legal implications arising from this report.

The Customer Experience service supports the council's compliance with statutory and regulatory requirements, including the handling of corporate and statutory complaints and Freedom of Information requests. Any future proposals involving changes to statutory processes or data use would be subject to legal review as part of the council's governance arrangements.

Comments checked by:

Jay Akbar

Head of Legal & Governance

Equality & Inclusion Implications

47. Customer Experience supports equitable access to services through multiple contact channels. Digital and AI-enabled tools referenced in this report have been implemented with appropriate testing and safeguards, including accessibility considerations, and retain the option for customers to speak to a live advisor.

Report by: Susannah Wintersgill
Director of Public Affairs, Policy and Partnerships

Contact Officer: Tom Parsons, Head of Customer Experience

April 2026

PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

17 APRIL 2026

Devolution Update: Thames Valley Strategic Authority

Report by Martin Reeves, Chief Executive

RECOMMENDATION

1. **The Performance & Corporate Services Overview & Scrutiny Committee is RECOMMENDED to:**
 - NOTE progress on the Devolution Programme since December 2025; and
 - NOTE how the draft Cabinet report (annexed) responds to the Overview & Scrutiny Committee's recommendations agreed in December 2025.

Executive Summary

1. This report provides the Overview & Scrutiny Committee with an update on progress of the Devolution Programme since the Committee considered the initial Expression of Interest (EOI) for a Mayoral Strategic Authority (MSA) in December 2025. It is intended to respond directly to the Committee's recommendations in December 2025 that the Cabinet ensures that members, stakeholders, and the wider public are kept informed about progress and outcomes, recognising the uncertainty inherent in the devolution process.
2. Since the last meeting of the Scrutiny Committee in December 2025, two Expressions of Interest have been submitted to Government. The first was sent in December 2025 following the recommendation supported by the Scrutiny Committee to open discussions with Government for a Mayoral Strategic Authority for the Thames Valley area.
3. Subsequently, Government clarified its expectations through a Ministerial Statement indicating that Foundation Strategic Authorities (FSAs) are the route through which areas may progress towards an MSA. A second EOI was therefore submitted on 20 March 2026 in line with this guidance and expanding on the EOI submitted in December 2025.
4. This report also notes that Leaders from the Thames Valley undertook a Ministerial visit on 10 March 2026 with the Minister for Devolution, Faith and Communities to outline our continued intent for a Mayoral Strategic Authority. The Leaders gained a greater understanding of Government expectations,

next steps, and timescales. Leaders were advised that the only means to a MSA is through a FSA. The Minister further assured the Leaders that, she would welcome further discussions on progress from an FSA to an MSA in due course.

Background

1. In December 2025, the Overview & Scrutiny Committee considered a report on a proposed Expression of Interest to Government for a Mayoral Strategic Authority and agreed recommendations to Cabinet intended to:
 - ensure consistency and clarity in messaging on the benefits and implications of devolution; and
 - strengthen communication and transparency for councillors, stakeholders, and the public, given the uncertainty of the national devolution process.
2. Cabinet considered the Committee's comments and provided a formal response, accepting the importance of clear communications, stakeholder engagement, and transparency as the programme develops.
3. The Scrutiny Committee are asked to note the draft Cabinet report and make any recommendations to Cabinet as it proceeds through the devolution process.
4. Any future proposals will return to members through the Council's governance and scrutiny arrangements before decisions are taken.

Annex: Draft Cabinet report for consideration on 21 April 2026 and accompanying annexes.

Background papers: Devolution White Paper December 2024
English Devolution and Community Empowerment Bill

Contact Officer: Kim Sawyer
Programme Director for Devolution
07547 867004
Kim.sawyer@oxfordshire.gov.uk

CABINET
21 APRIL 2026

Devolution Update: Thames Valley Strategic Authority

(DRAFT) Report by Martin Reeves, Chief Executive

RECOMMENDATION

The Cabinet is RECOMMENDED to:

1. Note progress on devolution discussions across the Thames Valley between December 2025 and March 2026.
2. Note the evolving national policy context and the emerging position on governance and the supplementary expression of interest (EOI) submitted on 20 March 2026.
3. Agree the proposed next steps to continue constructive engagement with partner authorities and Government, while maintaining the Council's commitment to securing a Mayoral Strategic Authority (MSA) for the Thames Valley.

Executive Summary

4. This report provides a focused update on devolution discussions across the Thames Valley since the Cabinet considered this matter in December 2025. At that meeting, Cabinet confirmed its strong strategic preference for a Mayoral Strategic Authority (MSA) as the model best able to secure significant powers, long-term funding, and national influence for the region.
5. Since December, Government policy has evolved. National messaging has clarified that, for areas not yet within the Devolution Priority Programme, the expected route to an MSA is now via the establishment of a Foundation Strategic Authority (FSA) as an initial stage. In response, Thames Valley partners have pursued a pragmatic approach: continuing to advocate for an eventual MSA, while exploring the scope and potential role of an FSA should Government require an interim foundation phase. As a result a further expression of interest was submitted on 20 March 2026 (Annex 2A) for an FSA.
6. The Councils now await the Minister's response to the Thames Valley's expressions of interest and further clarity on the pathway, pace and criteria for progression from an FSA to an MSA.

Background and Context: Key Developments Since December 2025

In December 2025, Cabinet agreed that Oxfordshire County Council should continue to work with partners to pursue devolution for the Thames Valley and that a Mayoral Strategic Authority represented the preferred and intended governance model, given its ability to provide clear accountability, stronger leadership, and access to the fullest range of devolved powers and funding.

Since that decision, three developments have materially shaped the direction of discussions:

1. Clarification of national policy – The Ministerial Statement in December 2025 <https://questions-statements.parliament.uk/written-statements/detail/2025-12-04/hcws1128> and correspondence from the Minister on 12 February (Annex 1) have made clearer that areas outside the Devolution Priority Programme are expected to build capability and partnership through an initial FSA before accessing mayoral arrangements.
2. Linkage to strategic planning and growth – Ministerial correspondence (Annex 1) explicitly linked strategic planning responsibilities (including Spatial Development Strategy geography) with invitations to come forward as an FSA, reinforcing the role of FSAs in preparing areas for deeper devolution. Councils were encouraged to consider the Spatial Development Strategy geography as a sensible geography for any future FSA.
3. Increased emphasis on readiness and deliverability – Engagement with Ministers and officials has highlighted Government's focus on strong foundations, demonstrable joint working, and credible governance as prerequisites for progression to an MSA.

These changes represent a shift in sequencing rather than ambition. Thames Valley Leaders and officers have consistently reaffirmed that an MSA remains the intended end-state, while recognising the need to respond constructively to the national framework now being applied by Government.

On 20 March 2026 the Leaders agreed to submit an expression of interest (EOI) in response to the Ministers letter of 12 February to proceed with an FSA. This EOI was supplementary to the earlier EOI submitted by the Thames Valley Leaders in December 2025 (Annex 2B).

Progress December 2025 – March 2026 ***Engagement with Government***

Informal engagement has continued with Ministers and officials to understand expectations on governance, geography and timing. Government has reiterated that mayoral governance remains its preferred model, while signalling that an FSA is now the expected entry point where partnership maturity and delivery track record need to be strengthened.

In discussions with Ministers on 10 March 2026, Leaders were clear that the Thames Valley remains ambitious for an MSA and that any FSA would be pursued explicitly as a step towards that goal.

Partnership Working Across the Thames Valley

Leaders across the Thames Valley have continued to explore options for a strategic authority that reflects functional economic geography while respecting local political realities.

Work has focused on identifying areas of clear strategic common ground and on understanding differential readiness across the geography. While variation of opinion regarding an FSA exists, there has been continued commitment to constructive dialogue and maintaining momentum.

Strategic Case for Devolution

Further evidence has been developed on the economic, housing, transport and skills case for devolution at Thames Valley scale (Annex 2C)

This work continues to underline the strategic importance of the Thames Valley to national growth and the value of devolved decision-making to unlock infrastructure and productivity.

Strategic Authority Models: An FSA as the foundation for an MSA

As a first-wave FSA, the Thames Valley would be well-placed to act as a pioneer for this model, shaping how FSAs operate in practice and demonstrating how they can accelerate progress towards an MSA.

An FSA would enable the Thames Valley to:

- Establish a formal strategic authority covering agreed functional economic geography.
- Carry out defined strategic functions, including:
 - Strategic planning and preparation of a Spatial Development Strategy;
 - Strategic transport coordination and prioritisation under a Local transport Plan;
 - Economic development, productivity and inward investment under a Local growth Plan;
 - Skills coordination and engagement with national programmes with specific responsibility for adults skills;
 - Supporting housing delivery at scale through strategic alignment and the potential to work with Homes England in a strategic partnership.

- Strengthen joint working, shared capacity and collective decision-making.
- Build a demonstrable track record of delivery and partnership in advance of mayoral governance.

A table of the FSA functions is included at Annex 3.

Importantly, any move towards an FSA would be pursued on the explicit basis that it is a stepping stone to an MSA, not an alternative end-state. This approach is consistent with the position agreed by Cabinet in December 2025 and reflects a pragmatic response to the Government's current policy framework.

Corporate Policies and Priorities

Progress on devolution continues to support the Council's objectives for inclusive growth, infrastructure delivery and increased local influence over strategic decisions affecting residents and businesses.

Financial Implications

There are no direct financial implications arising from this update report. Any future devolution agreement would be accompanied by a full assessment of financial implications.

Comments checked by: TBC

Name, Title, email (Finance)

Legal Implications

There are no immediate legal implications arising from this update. Any formal devolution arrangements would be subject to detailed legal advice and approval.

Comments checked by: TBC

Name, Title, email (Legal)

Staff Implications

There are no immediate staff implications. Further programme capacity requirements will be considered as proposals develop.

Equality & Inclusion Implications

No specific equality or inclusion impacts arise at this stage. These considerations will be integral to the development of any future proposals.

Sustainability Implications

Devolution offers opportunities to strengthen strategic action on transport, climate and sustainable growth, which will be developed further as proposals mature.

Risk Management

Key risks remain:

- Continued alignment across partner authorities where forthcoming elections could impact the political landscape of the Thames Valley;
- Uncertainty over Government timing and progression criteria as the FSA would be established under the English Devolution and Community Empowerment Bill which has not yet received Royal Assent
- Opportunity costs if the area is unable to move at pace.

These risks are being managed through continued engagement, evidence-building and dialogue with Government.

Consultations

Engagement to date has focused on partner authorities and informal Government discussions. Formal consultation would follow a favourable Government response to our EOI.

A programme of stakeholder engagement would also be expected to commence in early Summer.

Annex 1: Ministers' letter 12 February 2026

Annex 2A: Supplementary expression of interest

Annex 2B: Existing expression of interest

Annex 2C: Strategic Case for Devolution at Thames Valley Scale

Annex 3: Table of FSA functions

Background papers: Devolution White Paper December 2025

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DRAFT



Ministry of Housing, Communities & Local Government

Matthew Pennycook MP
Minister of State for Housing and Planning
2 Marsham Street
London
SW1P 4DF

Annex 1

Miatta Fahnbulleh MP
*Parliamentary Under Secretary of State for
Devolution, Faith and Communities*
2 Marsham Street
London
SW1P 4DF

All Council Leaders, All Mayors, and All Chief Executives

12 February 2026

Dear Leaders, Mayors, and Chief Executives,

Economic growth is the number one mission of this government. We know that growth is best achieved when local leaders are empowered to think strategically across the right geographies, supported by strong institutions, and when they have the ability to plan for the long term. This belief has underpinned our ambitious programme of deepening and extending devolution. It has also guided many of our changes to the planning system.

We are determined to keep up the pace on these vital reforms. That is why we wrote to you before Christmas about our overhaul of national planning policy, and it is why today we are taking two further steps: publishing a non-statutory consultation on the geographies for Spatial Development Strategies (SDSs), so that we can confirm the areas across which the new system of strategic planning will operate; and inviting expressions of interest from authorities without an existing devolution agreement to be part of a new wave of Foundation Strategic Authorities (FSAs) across England.

Spatial Development Strategies

The Planning and Infrastructure Act 2025 reinstates a strategic planning system for England. Once the provisions in the Act are commenced – which is expected by the summer – places will be required to produce an SDS. These strategies will deal with strategic and cross-boundary issues and set the context for local plans, which will have to be in ‘general conformity’ with the umbrella SDS once adopted. By taking a sub-regional view of how growth needs can be sustainably met, they will help us build more homes, co-ordinate the delivery of strategic infrastructure, grow the economy, and improve the environment and climate resilience.

We strongly believe that strategic planning, as just one part of the growth equation, is most effective when done over devolution geographies. Aligning it with Strategic Authorities’ transport, skills, and economic development powers will help ensure better integrated, more effective delivery. This is why we set out, in the English Devolution White Paper, that Mayoral Strategic Authorities will be empowered to produce SDSs for their regions, and why we are giving Mayors strategic development management powers through the English Devolution and Community Empowerment Bill, currently before Parliament. This will enable Mayoral Strategic Authorities to guide planning applications of

potential strategic importance to ensure that the overall strategy and any policies within the SDS are being implemented.

For parts of the country currently without mayoral devolution, we have set out that SDSs need to be developed across 'sensible geographies' in line with the principles of the English Devolution White Paper. Today we are launching a consultation on what these sensible geographies might be. In some places, there is already broad agreement on them, and we have indicated these in the consultation. In other places, we do not believe there is a consensus view yet, and so we are seeking proposals from you that align with the 'sensible geography' criteria in the White Paper.

Where SDSs are not coterminous with Strategic Authorities, the formal mechanism for areas to work together on their SDS will be a Strategic Planning Board (SPB), which will be established through secondary legislation. We will undertake statutory consultation prior to establishing these boards, alongside more detailed engagement and discussion with relevant authorities. This is expected to take place in the spring for most areas, but there may be an opportunity to move ahead with this more quickly where there is clear agreement, in which case MHCLG officials will be in contact with authorities about the details of an SPB during the consultation period.

A new wave of Foundation Strategic Authorities

Given our belief that sensible strategic planning and devolution geographies will, in the vast majority of cases, be one and the same, the development of SDS footprints is also an opportunity to agree the shape of devolution geographies for areas currently without a Strategic Authority. The government is therefore inviting these places to come forward with expressions of interest for the establishment of new FSAs, which must meet the criteria in the English Devolution White Paper and therefore should, typically, align with SDS geographies. As you would expect, we are also working across government to ensure this approach aligns with other reform programmes affecting public service boundaries, including the current Review of Police Structures.

FSAs will have devolved powers over local transport and skills, as well as being responsible for delivering the area's SDS where the SDS boundary is coterminous with the FSA. There are then a further set of powers and partnerships available to FSAs – the full FSA offer is set out in Devolution Framework at Section 3.10 of the English Devolution White Paper. The government is also currently consulting on giving FSAs the power to raise an Overnight Visitor Levy, which would be an additional power not currently in the Devolution Framework.

The government remains firmly committed to mayoral devolution and is forging ahead with it – including through our Devolution Priority Programme – but we have been clear that this model works best when built on firm foundations. This includes the strong unitary structures we are creating through local government reorganisation, and we remain fully committed to delivering these important reforms within this Parliament to the timetable set out. Alongside this, we see FSAs – as non-mayoral Combined or Combined County Authorities – to be a valuable way to build local capacity and partnerships, and as a stepping stone towards mayoral devolution in the future. While we recognise the demands that delivering reorganisation places on local authorities, we do not see that as a barrier to conversations about the establishment of FSAs and how to devolve powers to unleash local growth. We want to discuss with local authorities interested in taking this forward how best to manage the two processes effectively.

We would therefore like to invite all areas in England without an existing devolution agreement to come forward with their neighbours to take on devolution through an FSA over a sensible geography. We welcome expressions of interest over the coming weeks and we will begin reviewing responses from 20 March.

This will help sustain momentum on this exciting next stage of empowering local government and ensure the government delivers the benefits of devolution to all parts of England as soon as we can. It is important that all expressions of interest have the support from the relevant authorities and meet the criteria set out in the English Devolution White Paper.

As we said in our letter just before Christmas, it is only through continued close working between all of us that we will deliver the homes, jobs and improved living standards we owe to those we serve. The steps we are taking today will help embed that cooperation not just in this Parliament, but for years to come.

Best Wishes,



MIATTA FAHBULLEH MP
Parliamentary Under Secretary of State for
Devolution, Faith and Communities



MATTHEW PENNYCOOK MP
Minister of State for Housing and Planning

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Matthew Pennycook MP

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Our Reference: TVDEVO

20 March 2026

Dear Ministers,

Expression of Interest for a Thames Valley Strategic Authority

We, the Leaders in Thames Valley, are submitting this Expression of Interest (EOI) in response to your letter of 12 February 2026 and following our meeting with the Minister, Miatta Fahnbulleh, on 10 March 2026.

Further to our previous correspondence and discussions we have a compelling case for a Mayoral Strategic Authority (MSA) and electing a Mayor in 2028. The Minister was clear in our meeting on 10 March 2026 that ‘the economic case is made’, therefore if an FSA is the only means by which we can achieve that ambition we are ready to progress with an FSA and would like to express our aspirations for an election of a Mayor in May 2028, if that is considered to be achievable. The current mandate from our various Councils is to pursue a Mayoral Strategic Authority and, should the Minister support this EOI which endorses and expands upon our earlier EOI, we would require a further mandate from our Councils to propose the route through an FSA. We would propose to seek that mandate at pace prior to consultation on any formal proposal.

The following sets out how a Thames Valley Strategic Authority aligns fully with the principles and expectations expressed in your letter of 12 February.

The Thames Valley is one of the UK’s most economically significant regions with the potential to rank as England’s second most productive economy per capita and the

third largest MSA by economic output. However, its potential is currently constrained by fragmented labour markets, infrastructure deficits, and the absence of a unified strategic authority. The Thames Valley is the only region among the UK's top ten economies not served by a directly elected mayor, creating a gap in representation and strategic oversight that could hinder our competitiveness, productivity and ability to deliver inclusive growth as identified in **Annex 1**.

The Thames Valley faces major constraints to growth that we believe can only be unlocked by a Mayoral Strategic Authority (MSA). Priority growth areas such as the Oxfordshire to Cambridge corridor continue to face significant imbalances in investment, infrastructure, and governance. While neighbouring regions benefit from coordinated leadership and targeted support, the Thames Valley risks being left behind in terms of economic development and regional planning. This, in turn, would impact the Government's own plan for growth.

Expression of Interest

Our EOI seeks to formalise a strategic governance model that can unlock the region's full potential, support national missions, and deliver benefits for residents, employers, and the wider UK economy.

The Government's invitation sets out several expectations for FSAs. We summarise each requirement below and show how the Thames Valley proposal meets them.

a) Clear functional economic geography

The Thames Valley already operates as a polycentric but coherent economic region. Despite current fragmentation, our economic data shows:

- A combined population of **1.97 million**.
- A GVA of **£97.3 billion** (2023).
- Nationally significant assets, including world-leading universities, innovation districts (Harwell, Culham, Aldermaston), and global employers along the M4/M40 corridors.

Our EOI directly responds to Government's requirement for FSAs to demonstrate a clear economic footprint and the ability to operate at scale.

b) Partnership and collaboration across local government

Collaboration across the Thames Valley is already strong and mature:

- The **Berkshire Prosperity Board** brings unitary councils together around shared economic priorities.
- The **Oxfordshire Leaders Joint Committee** provides long-standing strategic leadership across county and district councils.
- Joint programmes such as the **Oxford Growth Commission**, **England's Economic Heartland**, the **Oxford-Cambridge Corridor**, and

cross-boundary transport planning demonstrate our readiness to work collectively.

Formalising this collaboration under a Strategic Authority meets Government expectations for credible and effective partnership structures.

c) Capacity to deliver strategic functions

The region is prepared to take on strategic functions, including:

- Transport and connectivity (Local Transport Plan, rail investment coordination, bus franchising assessment).
- Housing and regeneration (Spatial Development Strategy, accelerated delivery models).
- Skills (integration with LSIPs, alignment with priority growth sectors, stronger links with DWP).
- Economic development (inward investment, innovation acceleration, coordinated regional planning).

These functions align directly with the February letter's expectation that FSAs must focus on the strategic levers that support economic growth and national priorities.

At our meeting with you on 10 March 2026 it was recognised that the FSAs needed to be strengthened beyond the powers and responsibilities that were originally included in the devolution framework set out by Government. We remain committed to securing a Mayoral Strategic Authority at pace, with your agreement, for the Thames Valley to maximise the benefits to the regional economy. This EOI is submitted in good faith that Government will ensure FSAs have the necessary powers, funding and responsibilities to drive the regional economy, creating a springboard for a future MSA investment strategy that attracts significant institutional and cross-sector inward investment, enabling the objectives of a Thames Valley Growth Plan.

d) Alignment to national missions

Our proposal aligns with the Government's mission to kickstart economic growth particularly focused in these areas:

- **Innovation** – leveraging R&D clusters, supporting diffusion of innovation.
- **Skills** – boosting access to high-value employment, tackling economic inactivity.
- **Housing** – addressing affordability constraints that undermine productivity.
- **Net zero and energy resilience** – embedding climate adaptation and sustainability into growth planning.
- **Infrastructure** – unlocking grid, water and transport constraints that currently limit business expansion.

e) Strong case for an effective governance model

The Thames Valley offers a distinctive opportunity for Government:

We are not seeking to generate growth from a low base; we are seeking to unlock constraints in one of the UK's most productive regions. Delivering full economic integration could generate:

- **£18.7 billion** additional GVA annually by 2040.
- **£7 billion** additional annual tax revenue.

This represents one of the strongest potential returns of any proposed Strategic Authority.

Strategic Purpose

To create a joined-up, high-performing regional economy by reducing fragmentation, strengthening collaboration, and enabling transport, housing, skills, and economic policy to operate at the scale of the real functional economic area.

The proposed FSA builds on—and does not replace—the responsibilities of unitary councils. Councils retain control of local service delivery; the Strategic Authority provides the scale, coherence, and convening power needed for:

- Region-wide spatial planning.
- Integrated labour market strategies.
- Long-term infrastructure planning.
- Coordinated transport and skills investment.

Governance and Readiness

We propose establishing the Thames Valley Strategic Authority through a partnership governance model with clear accountability, transparent decision-making and strong local leadership.

The region's established track record of joint working demonstrates both readiness and credibility.

Proposed Strategic Functions

The Strategic Authority would lead or coordinate the following strategic functions:

Transport and Connectivity

- Develop an integrated Local Transport Plan Coordinate strategic rail priorities including East-West Rail, Western Rail Approaches, Southern Access, and Oxford-Reading-Swindon links.
- Explore bus franchising to increase reliability, access, and affordability.
- Enhance digital connectivity across rural and urban areas.

Skills and Employment

- Align Adult Skills Funding and LSIPs with regional labour market needs.
- Work with DWP on joint initiatives to tackle economic inactivity and youth unemployment.
- Strengthen employer-education partnerships.

Housing and Spatial Planning

- Develop a Spatial Development Strategy aligned with regional economic priorities.
- Work with Homes England and the Oxford Growth Commission on delivery vehicles to accelerate housing supply.
- Coordinate infrastructure delivery to unlock major housing sites.

Economic Development and Innovation

- Create a single Local Growth Plan (subject to these powers being included in the FSA model).
- Coordinate inward investment activity.
- Establish a UKRI-backed Innovation Accelerator.
- Support sector-specific clusters including life sciences, defence and security, and advanced manufacturing.

Environment, Net Zero and Climate Resilience

- Deliver a regional climate resilience framework.
- Accelerate nature recovery, flood mitigation, and green infrastructure.

Health, Wellbeing and Public Service Integration

- Work closely with the Integrated Care Board to link economic development with wealth and wellbeing outcomes.

Public safety

- Work with the Thames Valley Police to ensure alignment of policing objectives with the strategic objectives and delivery of the new authority.
- Subject to amendments to the Devolution and Community Empowerment Bill, provide a singular Fire and Rescue Authority aligned to the boundaries of the new strategic authority.

Distinctiveness of the Thames Valley Proposal

The Thames Valley Strategic Authority differs from existing arrangements in key ways:

- An established high-growth region seeking to remove constraints,
- Multiple complementary hubs rather than a single dominant city.
- Strong innovation assets aligned with national missions.
- It meets all the key priority sectors identified in the industrial strategy.

- A proven ability to deliver growth quickly when barriers are removed.

Next Steps

We welcome the opportunity to engage further with Government officials to refine our proposal, including:

- Working through governance options and timetabling to assist the Government's public sector reform agenda.
- Identifying appropriate fiscal tools aligned to the region's growth model.

We stand ready to support, at pace, the Government's ambition for a nationwide network of Strategic Authorities and to demonstrate how the Thames Valley can play a leading role in national economic renewal.

Yours sincerely,



Cllr Liz Leffman
Leader
Oxfordshire County Council

**On behalf of the
Oxfordshire Leaders**



Cllr Dexter Smith
Leader
Slough Borough Council

**On behalf of the
Berkshire Prosperity Board**

Dear Secretary of State,

We, the leaders of the local authorities in the Thames Valley, are writing to you in your capacity as Secretary of State for Housing, Communities and Local Government regarding our desire for devolution and our inclusion on a future Devolution Programme.

We have carefully considered our rationale and case for devolution to this region and see a significant opportunity to drive growth and prosperity as a Mayoral Strategic Authority. Our £97 billion economy is already a core contributor to the national economy and will continue to add economic value through our highly productive and innovative businesses, constituting the sectors prioritised in the Modern Industrial Strategy and a large part of the Ox-Cam Corridor, a key national growth proposition. However, the region's post-pandemic recovery has been slower than the national trajectory, and our globally recognised clusters face increasingly strong competition. We will use the powers, investment and platform as an MSA to unlock constraints on growth, with the potential for the Thames Valley economy to be up to £18.7 billion a year larger by 2040, which corresponds to a £7 billion annual uplift in tax revenue contributions to the exchequer.

We have come together as strong local Leaders to pursue the significant opportunities of devolution for our communities. Whilst we acknowledge and respect our differing political and local priorities, together we recognise and collectively support the core economic rationale and strategic intention for delivering inclusive growth within a Thames Valley MSA. We stand ready with the strength of relationships, trust, track record, collective governance and ways of working required to work with Government and implement a successful MSA. We would like to work towards a first mayoral election in May 2027, in line with the current timeline for local government reorganisation.

Importance of the Thames Valley for the UK Economy

The Thames Valley serves as an innovation-driven and export-focused catalyst for UK economic growth, accounting for approximately 5% of England's total economy while comprising just 3.4% of its population. Our economy comprises world-renowned universities, respected research centres, and leading science parks filled with forward-thinking companies, driving innovation ecosystems that spur new ideas and growth across UK supply chains. Oxford University is a jewel in the UK's global research offer, and our partnerships with Reading University creates value for residents, businesses, and investors through key assets such as the Thames Valley Science Park, which hosts research facilities and archives for the Natural History Museum, British Museum and Kew Gardens. Our region is a globally compelling investment case, with major global companies such as Microsoft, Oracle, Redwood Technologies, Virgin, Vodafone, and Hewlett-Packard located in the UK's Silicon Valley along the M4 corridor, with direct links to London and Heathrow Airport. From the region that gave the world the Oxford–AstraZeneca COVID-19 vaccine, the Ellison Institute of Technology in Oxford is now investing over £10 billion in research and development to facilitate further globally significant advancements in artificial intelligence, robotics, and life

sciences. Major investment in AI infrastructure has been secured across the region, with the second largest concentration of data centres in the world in Slough and the first AI Growth Zone in Culham. We have high-performance manufacturing capabilities along the M40 corridor, exemplified by Plant Oxford, home to BMW Mini, extending into Banbury and the UK Motorsports Valley into the Midlands. We are home to world-famous tourist attractions, from Windsor to the Cotswolds, Oxford, Blenheim Palace and Bicester Village. We are known world-over as a great place to visit, live, innovate and invest. Our investment proposition is already backed by Government, with continued global promotion of the Oxford-Cambridge corridor, of which we are a core part, investment in East-West Rail, high-profile support through the Oxford Growth Commission and recent investment in the Cowley branch line.

The industrial composition of the Thames Valley directly aligns with almost all the sector strengths outlined in the Industrial Strategy – our economy is anchored by professional and business services, with notable capabilities in digital technologies, life sciences, advanced manufacturing and a prominent finance sector. The strength of the region's visitor economy not only supports our foundational sectors but also positively impacts our creative industries, especially our growing film and television cluster around Shinfield Studios. Proposed visitor economy investments, including the Puy du Fou Bicester, together with significant heritage landmarks would remain substantial contributors to export growth. Importantly, the Thames Valley demonstrates a strong orientation towards export activities: approximately 48% of the workforce is employed in exporting industries, and 40% hold positions within tradable sectors, both figures exceeding national averages. Exceptional productivity and economic complexity facilitate the dissemination of innovation across key sectors and strengthen supply chains nationwide. Furthermore, growth in GVA and household income in the Thames Valley has surpassed national rates, thereby improving local living standards and contributing positively to Exchequer revenues.

Signs of risk and stagnation

Despite the Thames Valley's underlying strength, the region has not re-established its pre-pandemic growth path. Post-Covid productivity indicators show mixed fortunes, even as the UK aggregate edged up through 2023, evidence that recovery here has been shallower than the national trend. If the region were to return to the pre-pandemic growth trajectory from 2027 onwards the Thames Valley economy would be up to £18.7bn a year larger by 2040. This matters for residents: a weaker trajectory means fewer high-value job opportunities and slower wage progression than would otherwise have been the case. Slower growth in the Thames Valley reverberates through national supply chains and weakens spillovers to other regions, putting at risk delivery of the Industrial Strategy's IS-8 ambitions on productivity, exports and business investment. It limits the pace at which discoveries are commercialised, dampens the pipeline of high-value FDI into the UK, and slows diffusion of technologies across the wider economy. Crucially, restoring the Thames Valley's growth trajectory would result in an estimated £7 billion increase in tax revenue contributions from residents and

businesses, directly strengthening the Government's ability to fund essential services and invest in long-term national priorities.¹

Scale and agglomeration to drive growth

To address these risks and realise our full economic potential, we need to leverage our potential for scale and agglomeration across our economic geographies. While each authorities' economy is individually strong, travel-to-work analysis reveals largely self-contained labour markets with currently limited cross-boundary matching and knowledge transfer across the region. In this current fragmentation lies a clear opportunity: given the region's complementary sector strengths the absence of integrated governance and coordinated connectivity means the Thames Valley is under-leveraging innovation adoption and diffusion and the opportunity to create a more unified labour market to scale economic growth.

Establishing an MSA with a growth mission at its core

We propose the establishment of a Thames Valley Mayoral Strategic Authority (MSA) as a decisive step towards realising inclusive growth across our region. By harnessing devolved powers, the MSA will transform thriving yet separate labour markets into a unified innovation economy, ensuring that prosperity is accessible to all communities. Through the implementation of a Local Growth Plan, we can extend and enhance the efforts of the Oxford Growth Commission to systematically address housing quantity, quality, and affordability across the Thames Valley, one of the key constraints on inclusive growth and a key driver of deprivation. MSA powers would enable accelerated delivery of affordable and social homes, around employment hubs. Integrated multi-modal, low carbon transport solutions could be expanded and expedited along the M4/M40 corridors, into Heathrow and across the Ox-Cam corridor, and critical investment in digital, water and energy infrastructure facilitated, strengthening connections between urban and rural residents and key economic growth nodes, and beyond. This infrastructure delivery would align with targeted skills and employment initiatives, developed with spatial awareness of our IS-8 strengths and a commitment to tackling deprivation and untapped potential within our communities. Enhanced collaboration and coordination enabled by the MSA would also position the region to more effectively address environmental priorities, including climate change and biodiversity.

Collectively, these measures would result in improved job opportunities, reduced commute times, and provide greater access to affordable housing for residents, supported by an aligned skills programme and transport system that matches talent to opportunity. For the UK, it means the Thames Valley driving national growth through faster innovation, stronger exports, and a bigger boost to the public purse.

We recognise the highly interconnected nature of the Thames Valley, with London, across the Ox-Cam Corridor and into the Midlands. A Thames Valley MSA will be a strategic

¹ This estimate is based off the ratio of GDP to national taxation (UK taxation as 37% of GDP) established by [Institute for Fiscal Studies](#) research

platform from which to go further and faster on pan-regional collaboration with our neighbours, including working on joint projects, spatial development and investment to drive wider economic growth. We are determined to use our Thames Valley partnership to further capitalise on economic scale and complementarity and compete across the globe.

If granted MSA status, the Thames Valley would be a fundamentally different kind of strategic authority – the largest by GVA outside of London, the MSA will be focused on unlocking constraints on an already high-performing economy so that all areas of the Thames Valley, and indeed beyond, benefit. We are therefore actively exploring innovative approaches to securing private investment and financing. Work is already underway to develop robust and viable propositions that match the scale and ambition for a Thames Valley MSA, and we look forward to working with Government to shape this more sustainable growth financing model.

Next steps

A Thames Valley MSA would unlock constrained, high-value growth, accelerate innovation diffusion across IS-8 sectors, and strengthen national fiscal headroom. We therefore ask that the Thames Valley be considered for inclusion in the next Devolution Programme, and we would welcome an early meeting to discuss this opportunity. We are ready to work in open dialogue with MHCLG and your officials to implement a new phase of devolution and make the best impact for our businesses, communities, and the country.



Thames Valley
Mayoral Strategic
Authority

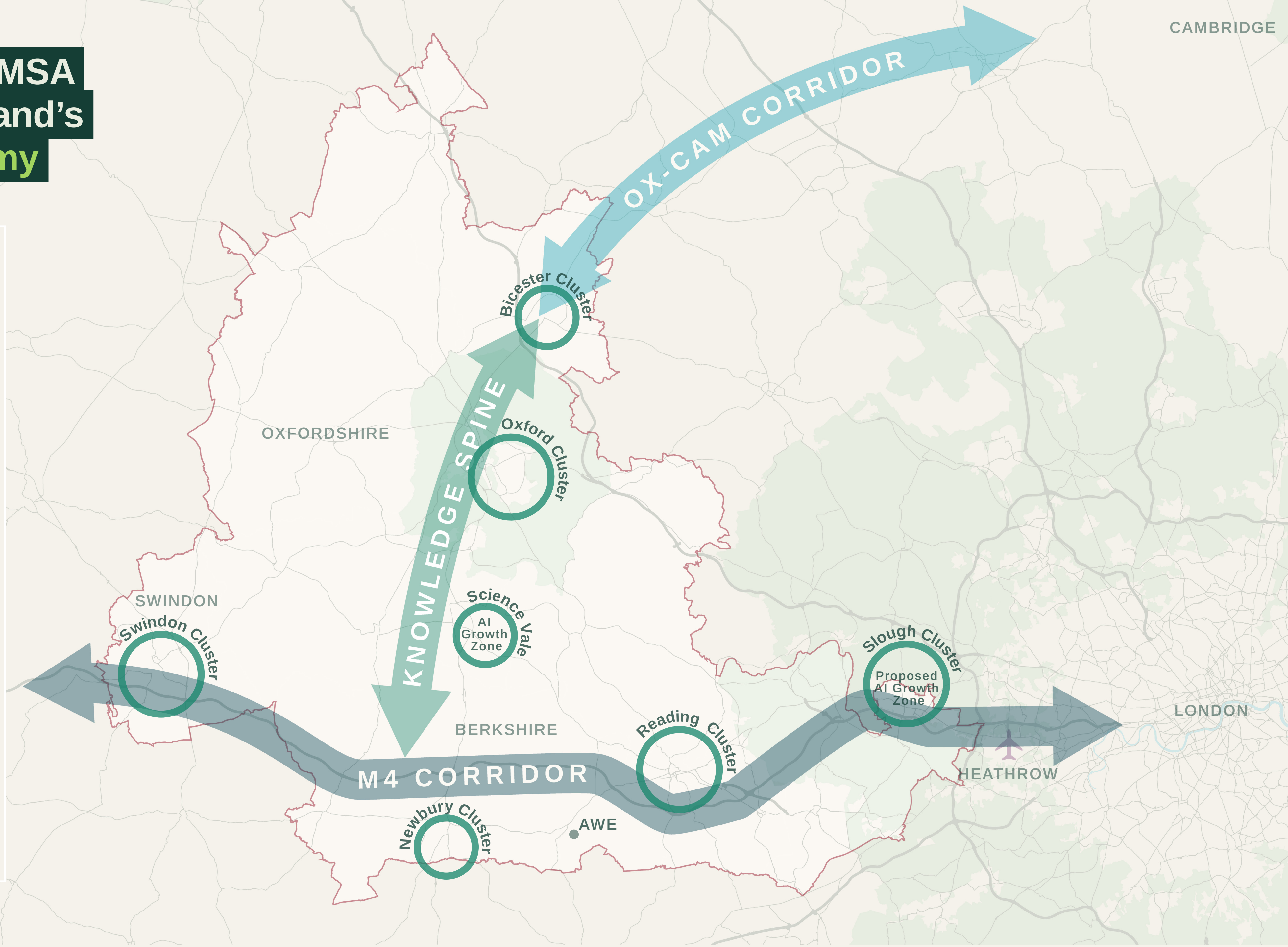
Annex 2c

Unlocking a UK economic powerhouse

The case for a Thames Valley Mayor

The Thames Valley MSA would rank as England's third largest economy

London	£577,141m
Greater Manchester	£100,350m
Thames Valley	£91,226m
West Midlands	£83,361m
West Yorkshire	£73,618m
East Midlands	£61,645m
North East	£52,163m
West of England	£43,376m
Liverpool City Region	£43,315m
South Yorkshire	£35,145m
Cambridgeshire and Peterborough	£34,086m
York and North Yorkshire	£28,456m
Greater Lincolnshire	£25,504m
Hull and East Yorkshire	£16,778m
Tees Valley	£16,728m



Thames Valley faces **major constraints to growth** that can only be unlocked by a Mayor

The region has ambitious plans for housing and employment but delivery rates are slow:

Over 47,000 homes are held back by viability or infrastructure challenges

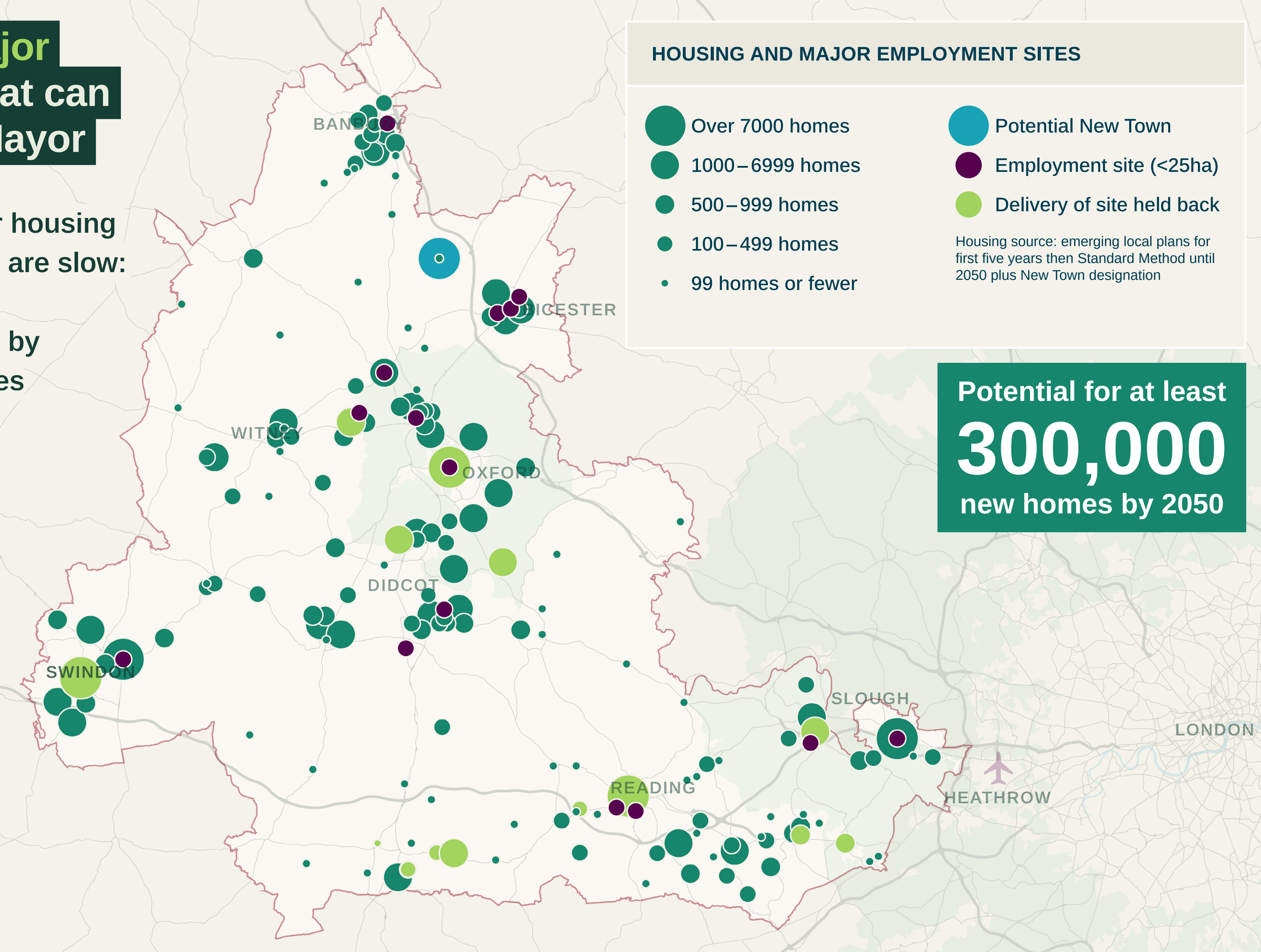
House prices are **£110,000** above national average

Houses are less affordable; 9.5x higher in TV and **11.2x** higher in Oxford than residential earnings, compared to an England average of **7.7x**

HOUSING AND MAJOR EMPLOYMENT SITES

- Over 7000 homes
- 1000–6999 homes
- 500–999 homes
- 100–499 homes
- 99 homes or fewer
- Potential New Town
- Employment site (<25ha)
- Delivery of site held back

Housing source: emerging local plans for first five years then Standard Method until 2050 plus New Town designation



Potential for at least **300,000** new homes by 2050

Fragmented governance and infrastructure is **holding us back**

Growth is constrained by a lack of infrastructure that needs a Mayor to coordinate improvements




Poor connectivity between settlements resulting in a disjointed economy

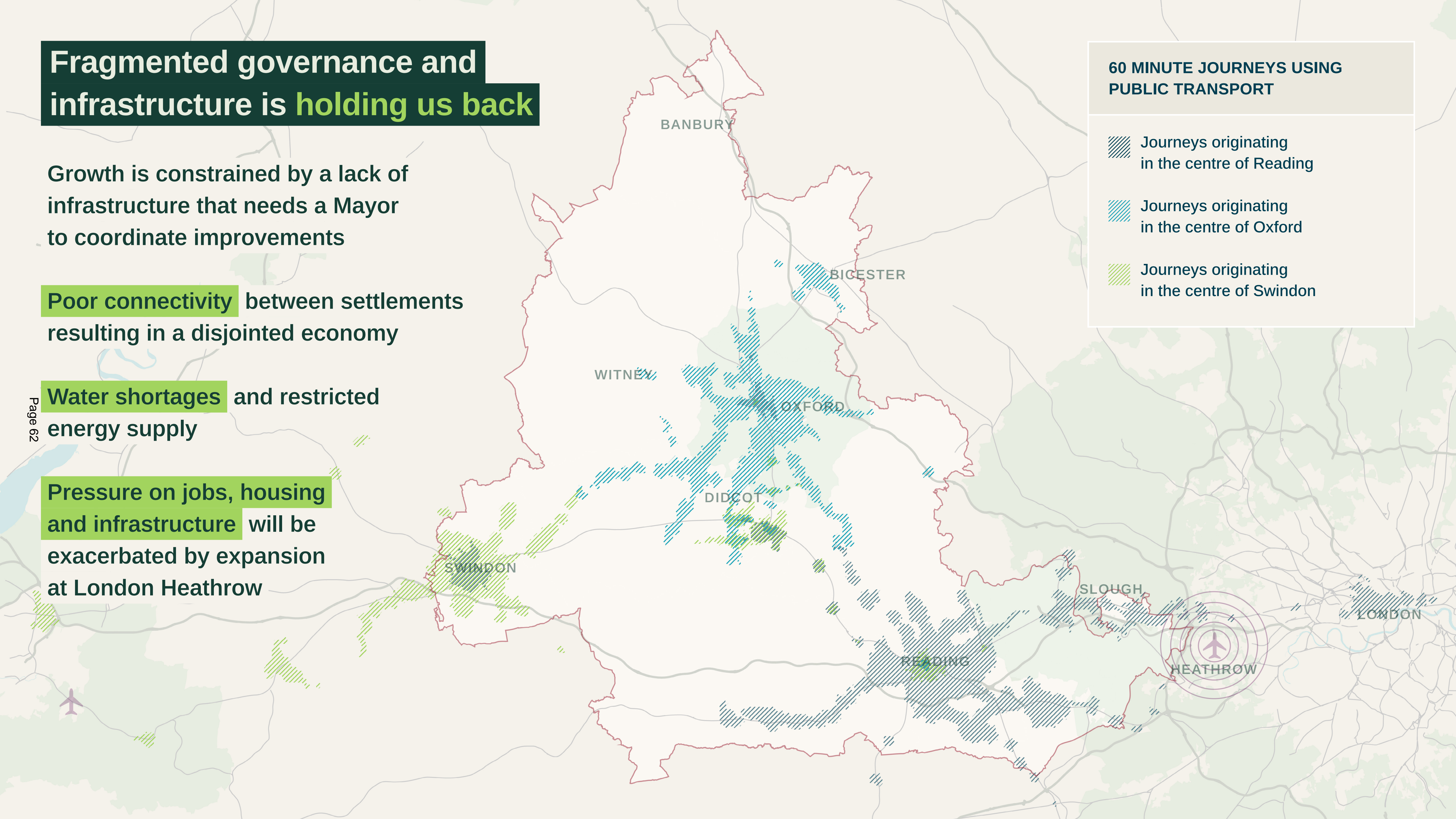
Water shortages and restricted energy supply

Pressure on jobs, housing and infrastructure will be exacerbated by expansion at London Heathrow

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60 MINUTE JOURNEYS USING PUBLIC TRANSPORT

-  Journeys originating in the centre of Reading
-  Journeys originating in the centre of Oxford
-  Journeys originating in the centre of Swindon



The Mayoral dividend

An MSA brings transformational uplift not possible through an FSA

A singular figurehead

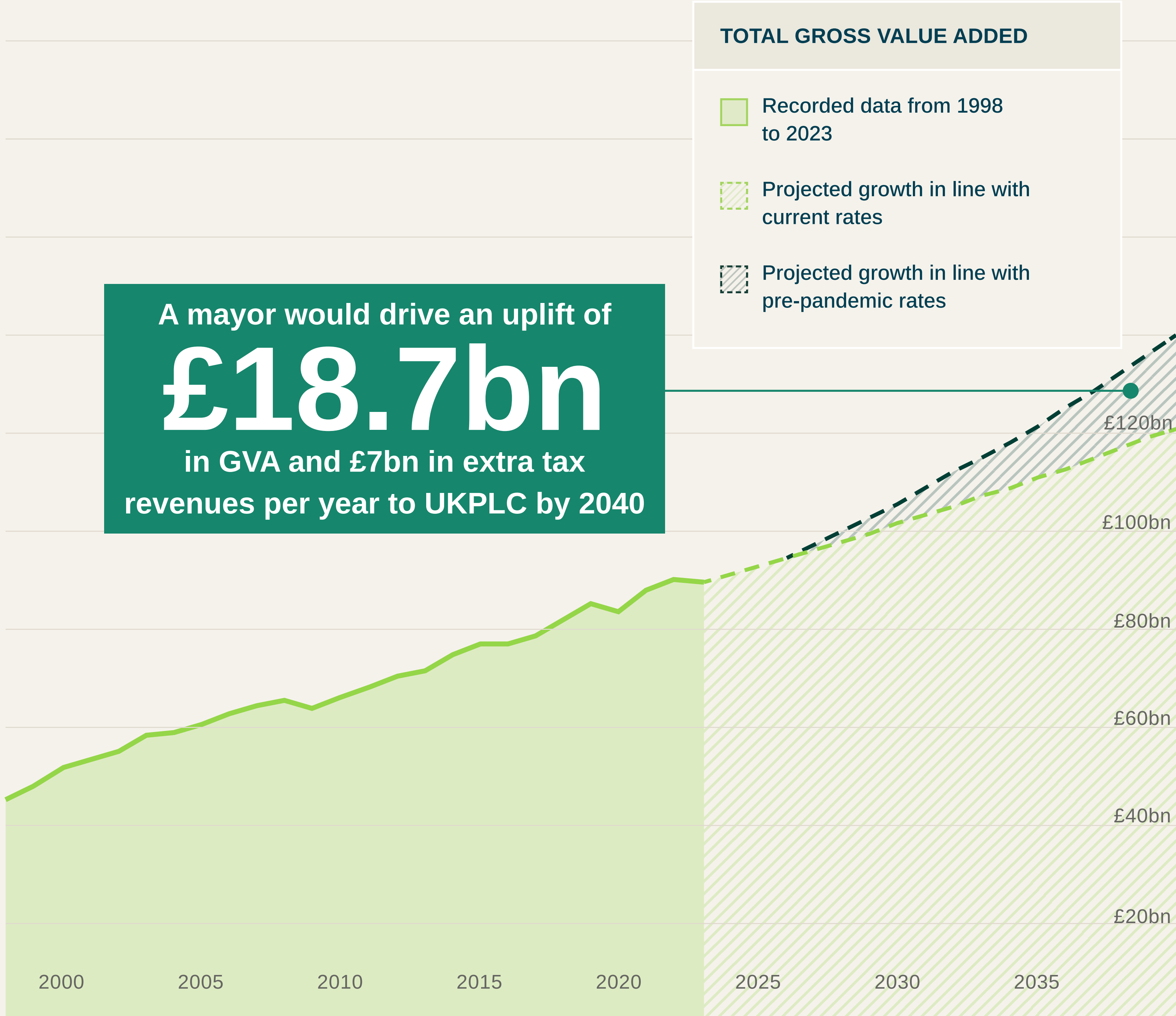
- Drive a vision and build confidence
- Drive inward investment
- Convening power
- Collaboration with other Mayors and regions
- Build investor confidence

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Housing and regeneration

- Consolidating strategic planning powers
- Implement Mayoral Development Corporations
- Strategic Place Partnership with Homes England

A mayor would drive an uplift of **£18.7bn** in GVA and £7bn in extra tax revenues per year to UKPLC by 2040



The Mayoral dividend

An MSA brings transformational uplift not possible through an FSA

Infrastructure

- Convening power and fundraising to deliver projects that unlock growth

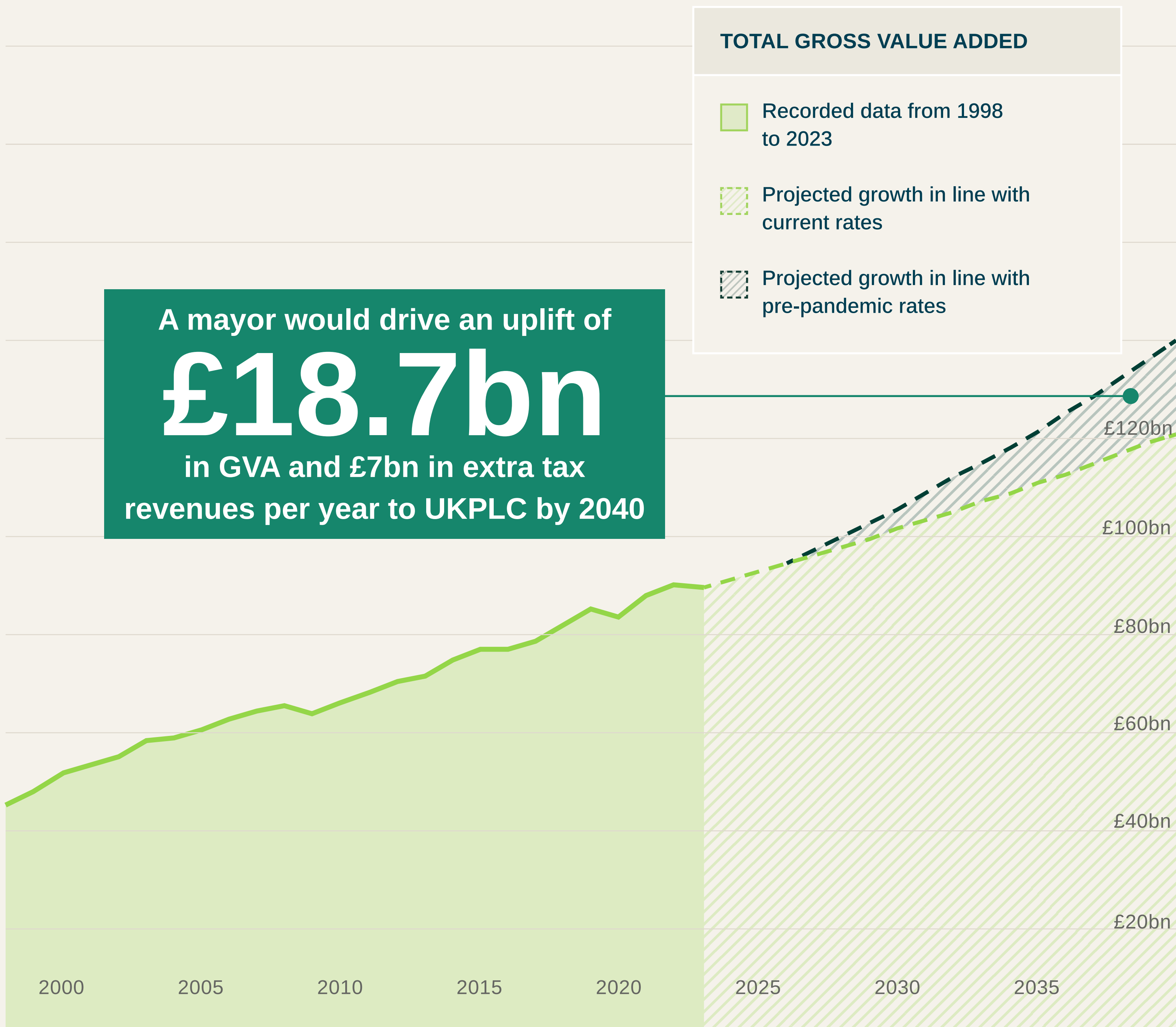
Skills

- Joining up skills delivery for the first time

Funding

- A focus on capturing and retaining value locally, with less reliance on HMG
- Business Rate Retention Zones

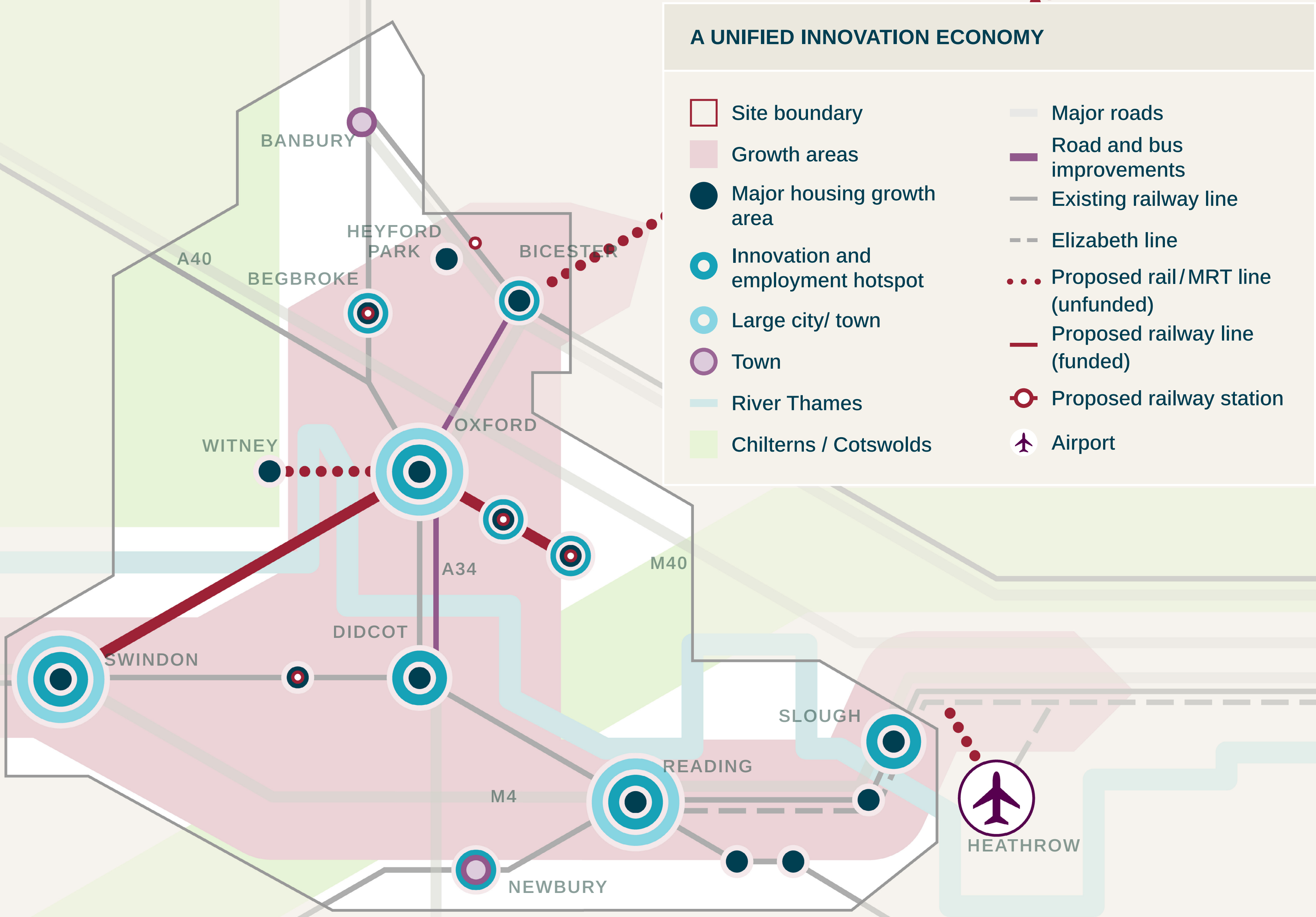
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Improved connectivity supercharging our polycentric economic powerhouse

With the support of our strategic partners across the region, including our world leading universities, institutes and companies, a Thames Valley Mayor provides the leadership to turn this high performing region into a national powerhouse for productivity, innovation and investment.

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**Thames Valley
Mayoral Strategic
Authority**



The framework below sets out the statutory functions of **Non-Mayoral Foundation Strategic Authorities** as set out in the English Devolution and Community Empowerment Bill and other legislation. As set out in the Devolution Framework in the English Devolution White Paper, different categories of Strategic Authorities are also guaranteed access to other non-statutory offers, including partnership and funding arrangements.

General Power

Statutory Function	Governance	Related Clauses
<p>General Power of Competence</p> <p>This extends local authorities' general power of competence to combined and combined county authorities. This lets them do anything that an individual could do.</p>	<p>Can only be exercised for the purpose of economic development and regeneration.</p>	<p>Clause 20 and Schedule 4 of the English Devolution and Community Empowerment Bill</p>

Area of Competence: Transport and Infrastructure

Statutory Function	Governance – where “Standard” means: <ul style="list-style-type: none"> • Voting is a simple majority • Exercised solely by the SA 	Related Clauses
<p>Local Transport Authority functions</p> <p>Strategic Authorities are the Local Transport Authority for their area, with responsibility for preparing and publishing a local transport plan and powers to secure the provision of passenger transport services where not otherwise provided. Strategic Authorities also have powers and duties to prepare a bus strategy for carrying out their bus functions, enter into partnerships with bus operators, enter into franchising schemes, and manage travel concessions.</p>	<p>Standard</p> <p>However, adoption of the Local Transport Plan requires the consent of all constituent councils.</p>	<p>Clause 29 and Schedule 9 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>Transport Act 2000 – Part 2</p> <p>Transport Act 1985 – Parts 4 and 5</p>
<p>Transport Levy</p> <p>Strategic Authorities can issue levies to their constituent authorities to meet the cost of exercising their transport functions, where otherwise not met.</p>	<p>Consent of all constituent councils required to agree the total sum.</p> <p>Apportionment between constituent councils is subject to the Transport Levying Bodies Regulations 1992.</p>	<p>Clause 13 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p>

		Local Government Finance Act 1988 – s.74
<p>Agreements between authorities and strategic highways companies</p> <p>This allows Strategic Authorities to enter into agreements with local highway authorities (upper-tier local authorities) and/or National Highways to delegate or share the maintenance and improvement of roads.</p>	<p>Standard, with the exception that:</p> <ul style="list-style-type: none"> • The function is exercised concurrently with local authorities. • Use of these functions requires the consent of the relevant constituent authority where the function would be exercised. 	<p>Clause 24 and Schedule 6 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>Highways Act 1980 – s.6 and 8</p>
<p>Civil enforcement of road traffic contraventions</p> <p>These powers enable Strategic Authorities to enforce parking, bus lane, and moving traffic contraventions through penalty charge notices. This is only possible if the relevant constituent council already has those functions and consents to the SA using them. The SA must follow existing statutory guidelines for charge levels for Fixed Penalty Notices and provide information on appeals processes.</p>	<p>Standard, with the exception that:</p> <ul style="list-style-type: none"> • The function is exercised concurrently with local authorities. • Use of these functions requires the consent of the relevant constituent authority where the function would be exercised. 	<p>Clause 25 and Schedule 7 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>Part 6 and Schedule 8 of the Traffic Management Act 2004</p>

<p>Key Route Network</p> <p>Foundation Strategic Authorities can set up and coordinate a Key Route Network. This will allow the most important local roads to be strategically managed.</p>	<p>Standard</p> <p>Roads can only be included in the Key Route Network with the consent of the constituent council where they are located.</p>	<p>Clause 27 and Part 1 of Schedule 8 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>Local Democracy, Economic Development and Construction Act 2009 – s.107ZA</p> <p>Levelling Up and Regeneration Act 2023 – s.22-24</p>
<p>Road User Charging</p> <p>These powers enable a Strategic Authority to make a joint road user charging scheme (e.g. congestion charging) with relevant constituent councils.</p>	<p>Standard, with the exception that this function can only be exercised jointly with the relevant constituent local traffic authority (the upper-tier local authority) where the scheme would take place.</p>	<p>Chapter I of Part III of the Transport Act 2000</p>
<p>On-Street Micromobility Schemes</p> <p>These powers enable Strategic Authorities, in their role as the Local Transport Authority, to license micromobility schemes operating on public roads and pavements. This allows them to have greater control of bike and e-bike rental schemes run by private companies. Other types of shared micromobility impacting on public space could also be included in the framework in the future.</p>	<p>Standard</p>	<p>Clause 23 and Schedule 5 of the English Devolution and Community Empowerment Bill</p>

Area of Competence: Skills and Employment Support

Statutory Function	Governance	Related Clauses
<p>Adult Education Functions</p> <p>Subject to a transition period for new Strategic Authorities, some powers of the Secretary of State relating to education and training of adults will be devolved to Strategic Authorities. These powers support the delivery of devolved adult skills funding.</p> <p>Powers relating to apprenticeships and people subject to adult detention are not devolved.</p>	<p>The relevant functions in section 90 and 100 of the Apprenticeships, Skills, Children and Learning Act 2009 are exercised concurrently with the Secretary of State.</p>	<p>Clause 30 and Schedule 10 of the English Devolution and Community Empowerment Bill.</p> <p>Host legislation:</p> <p>Apprenticeship, Skills, Children and Learning Act 2009 - s.86, s.87, s.88, s.90, s.100(1), s.100(1B)</p>

Area of Competence: Housing and Strategic Planning

Statutory Function	Governance	Related Clauses
<p>Spatial Development Strategy All Strategic Authorities will have a duty to produce a Spatial Development Strategy. These documents enable them to strategically plan for development across their whole area. <i>(Note: This will also be mirrored for all principal local authorities in areas without Strategic Authorities, where authorities will be required to collaborate via Strategic Planning Boards where necessary.)</i></p>	<p>Standard</p>	<p>To be introduced through clause 52 of the Planning and Infrastructure Bill: Part 1A of the Planning and Compulsory Purchase Act 2004</p>
<p>Housing and Land Powers, concurrent with Homes England These additional powers allow Strategic Authorities to acquire housing and land for the specific purposes (set out in the governance arrangements column). This includes powers to acquire land using the compulsory purchase powers previously solely held by Homes England. They also include the ability to provide financial assistance to any person, (again in line with the objectives set out in the governance arrangements column).</p>	<p>These functions are exercised concurrently with Homes England.</p> <p>In Foundation Strategic Authorities, use of compulsory purchase powers requires the consent of the local planning authority where the power is to be exercised (if different to the authority exercising the power).</p> <p>All of these functions must be exercised for the purposes of, or for purposes incidental to the objectives of:</p>	<p>Clause 34 and Part 1 of Schedule 15 (Acquisition and development of land) in the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>Housing and Regeneration Act 2008 – s.4A; 5-10; 19; Sch.2; Sch.3; Sch.4</p>

	<ul style="list-style-type: none"> a. Improving the supply and quality of housing in the area; b. Securing the regeneration or development of land or infrastructure in the area; c. Supporting in other ways the creation, regeneration or development of communities in the area or their continued well-being; d. Contributing to the achievement of sustainable development and good design in the area. 	
<p>Housing and Land Powers, concurrent with Local Authorities</p> <p>These powers enable Strategic Authorities to acquire and develop housing and land as well as provide services in relation to housing.</p> <p>Local authorities in unitary local government areas already have these powers.</p>	<p>For county councils designated as Strategic Authorities, these functions are exercised concurrently with district councils.</p> <p>In Foundation Strategic Authorities, use of compulsory purchase powers requires the consent of the local planning authority where the power is to</p>	<p>Clause 34 (Acquisition and development of land); Clause 35 (Housing accommodation); Part 2 of Schedule 15; and Schedule 16 of the English Devolution and Community Empowerment Bill.</p> <p>Host legislation:</p> <p>Housing Act 1985 - s.8, 9, 11, 12, 17, 17A, 18, 56, 57.</p>

	be exercised (if different to the authority exercising the power).	Town and Country Planning Act 1990 - s.226, 226A, 227, 229, 230, 231, 232, 233, 235, 236, 238, 239, 240, 241, 242, 243, 246, 271, 272, 274, 275, 276, 278, 306, 366.
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Area of Competence: Economic Development and Regeneration

Statutory Function	Governance	Related Clauses
<p>Duty to prepare an assessment of economic conditions</p> <p>Strategic Authorities must prepare and maintain an assessment of the economic conditions of their area.</p>	<p>Standard, except that exercise of function is concurrent with local authorities.</p>	<p>Clause 37 and Schedule 18 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>S.69 of Local Democracy, Economic Development and Construction Act 2009</p>
<p>Power to pay grant to a constituent authority</p> <p>This power enables Strategic Authorities to pay grants to their constituent councils. This is most commonly used to pass funding for maintaining local roads to councils.</p>	<p>When paying grants for councils' road functions, Strategic Authorities must make sure payments are sufficient for them to exercise their functions.</p>	<p>Clause 39 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>s.32A of the Local Government Act 2003</p>
<p>Powers to encourage visitors and provide entertainment</p> <p>These powers enable Strategic Authorities to encourage people to visit their area and provide, support, and/or contribute to the provision of entertainments, such as concerts, plays, or exhibitions, and incur expenditure for</p>	<p>Standard, except that exercise of function is concurrent with local authorities.</p>	<p>Clause 40 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>s.144 and s.145 of the Local Government Act 1972.</p>

<p>these purposes. This includes powers to provide premises, facilities, or publicity for cultural and recreational events.</p>		
<p>Power to arrange for publication of information relating to the functions of the Strategic Authority</p> <p>These powers enable Strategic Authorities to arrange for the publication of information related to their functions as well as services available in the area. This means that they can collect, compile, and disseminate such information.</p>	<p>Standard, except that exercise of function is concurrent with local authorities.</p>	<p>Clause 42 and Paragraph 2 of Schedule 20 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>Local Government Act 1972 – s.142(2)</p>
<p>Power to place staff at the disposal of other authorities</p> <p>These powers enable Strategic Authorities to enter agreements with other Strategic Authorities, local authorities, and other organisations like the NHS, to share staff services for their functions.</p>	<p>Standard, except that the function can be exercised concurrently with other Strategic Authorities, local authorities or other bodies such as NHS England or Natural England.</p>	<p>Clause 42 and Paragraph 1 of Schedule 20 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation: s.113 and 146A of the Local Government Act 1972</p>
<p>Power to prosecute and defend legal proceedings</p> <p>These powers allow Strategic Authorities to initiate or defend legal proceedings where they consider it expedient for</p>	<p>Standard, except that exercise of function is concurrent with local authorities.</p>	<p>Clause 42 and Paragraph 3 of Schedule 20 of the English Devolution and Community Empowerment Bill</p>

<p>promoting or protecting the interests of the residents of their area. This includes the ability to prosecute, defend, or appear in any legal action and to institute proceedings in their own name to address local concerns.</p>		<p>Host legislation: s. 222 of the Local Government Act 1972.</p>
<p>Research and collection of information</p> <p>These powers enable Strategic Authorities to conduct research and collect information on matters concerning their area to support their functions and share their findings.</p>	<p>Standard, except that exercise of the function is concurrent with local authorities.</p>	<p>Clause 42 and Paragraph 4 of Schedule 20 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation: s.88(1)(a) and (1)(b) of the Local Government Act 1985</p>

Area of Competence: Environment and Net Zero

Statutory Function	Governance	Related Clauses
<p>Heat Network Zoning coordination role</p> <p>This means that Strategic Authorities will be well placed to take forward heat network zones and create zone coordinators.</p>	Standard	s228(5) of the Energy Act 2023

Area of Competence: Health, Wellbeing and Public Service Reform

Statutory Function	Governance	Related Clauses
<p>A bespoke statutory health improvement and health inequalities duty</p> <p>When considering whether or how to use any of its powers and functions a Strategic Authority will have a duty to have regard to the need to improve the health of people in the Strategic Authority area and the need to reduce health inequalities in the local area.</p>	Standard	Clause 43 of the English Devolution and Community Empowerment Bill

Area of Competence: Public Safety

Statutory Function	Governance	Related Clauses
<p>Sharing of information in relation to crime and disorder These powers both enable and place a duty on Strategic Authorities to disclose information relating to the reduction of crime and disorder, including anti-social behaviour, to other relevant authorities (such as local authorities, social landlords and the police).</p>	<p>Standard, except that exercise of the function is concurrent with local authorities.</p>	<p>Clause 48 of the English Devolution and Community Empowerment Bill</p> <p>Host legislation:</p> <p>s.17A and s.115 of the Crime and Disorder Act 1998</p>

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PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

17 APRIL 2026

Community Asset Transfer and Community Leasing Policies

Report by Vic Kurzeja, Director of Property and Assets

RECOMMENDATION

1. **The Committee is RECOMMENDED to**
 - i.) NOTE the Cabinet report, and
 - ii.) AGREE any recommendations it wishes to make to Cabinet

Executive Summary

2. This report seeks the Scrutiny Committee's views on the Community Asset Transfer (Annex B) and Community Leasing (Annex C) policies. These policies are scheduled to go to Cabinet on 21 April 2026.
3. The Community Asset Transfer (CAT) Policy (Annex 1) replaces the 2019 version and distinguishes asset transfer from community leasing. It sets out the council's approach to transferring ownership of council assets to community organisations at below market value to achieve public benefit. It aims to empower local communities, ensure assets that are no longer needed by the council are used for social good.
4. The Community Leasing Policy (Annex 2) establishes a framework for leasing council-owned assets - such as buildings and land - to community organisations at below-best value to generate public benefit. Community leasing is only available to appropriately constituted community organisations and charities that can demonstrate clear social, economic or environmental benefits for local communities. The policy aims to maximise community value while safeguarding council interests and strategic objectives.

Key Points for Cabinet Decision

5. The Cabinet report attached as Annex A identifies that Cabinet are asked to approve the CAT and Community Leasing policies. As part of these policies, this will also entail the establishment of the Community Asset Transfer and Community Leasing Working Group, which will be responsible for assessing applications as well as maintaining a list of properties available for CAT and Community Leasing.

Corporate Policies and Priorities

6. These policies support the Council's Strategic Plan 2025-28, Marmot Place projects and Property and Assets Strategy 2022. See Annex A (the Cabinet Report) for an expanded breakdown of these.

Financial Implications

7. All financial implications are included within Annex A (the Cabinet report).

Comments checked by:

Drew Hodgson - Finance Business Partner (Resources & E&P)

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Legal Implications

8. All legal implications are included within Annex A (the Cabinet report).

Comments checked by:

Richard Hodby, Solicitor (Law and Governance)

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Staff Implications

9. These policies are procedural and do not require any new or additional staffing resources. The only changes they may make would be possible extra responsibilities for officers sitting on the working group.

Equality & Inclusion Implications

10. An Equality Impact Assessment has been completed for these policies (Annex D). This assessment does not identify negative impacts. Outcomes will be dependent on which VCS groups apply for a CAT or Community Lease.

Sustainability Implications

11. A Climate Impact Assessment has been completed for these policies (Annex E). This assessment identifies a positive impact.

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CABINET
TUESDAY 21 APRIL 2026

Community Asset Transfer and Community Leasing Policies

Report by Director of Property and Assets

RECOMMENDATION

1. **The Cabinet is RECOMMENDED to:**
 - a) Approve the Community Asset Transfer (Annex 1) and Community Leasing (Annex 2) Policies.

Executive Summary

2. Two policies have been developed regarding the leasing and transfer of council-owned property to voluntary and community organisations.
3. The Community Asset Transfer (CAT) Policy (Annex 1) replaces the 2019 version and distinguishes asset transfer from community leasing. It sets out the council's approach to transferring ownership of council assets to community organisations at below market value to achieve public benefit. It aims to empower local communities, ensure assets that are no longer needed by the council are used for social good.
4. The Community Leasing Policy (Annex 2) establishes a framework for leasing council-owned assets - such as buildings and land - to community organisations at below-best value to generate public benefit. Community leasing is only available to appropriately constituted community organisations and charities that can demonstrate clear social, economic or environmental benefits for local communities. The policy aims to maximise community value while safeguarding council interests and strategic objectives.
5. These policies establish the process by which community groups can apply for a CAT, the eligibility criteria of prospective groups and the assessment criteria used to assess applications.
6. These policies are on the forward plan for Performance and Corporate Services Scrutiny on 17th April 2026 and Cabinet for 21st April 2026.

Background Context – Definitions and National Policy

7. Community Asset Transfer (CAT) is defined by the Local Government Association as: 'transferring the ownership of land or buildings from a statutory

body to a Community Organisation at “less than best consideration” – that is at less than its full market value – in order to achieve a public benefit’

8. The Local Government Act 1972 s123 requires councils to obtain the “best consideration reasonably obtainable” when disposing of land or buildings.
9. However, General Disposal Consent (England) 2003 gives permission for councils to dispose at less than best consideration, provided that the undervalue is less than £2m (in capital terms), and the transfer benefits the economic, social, or environmental well-being of the area.

Community Asset Transfer at OCC

10. These policies replace the 2019 Community Asset Transfer Policy. Property and Assets officers have reported that this policy is now rarely used, having not received any applications for a new CAT since the Covid pandemic.
11. Property and Assets officers have also identified that the Council currently has very few empty properties in its portfolio. It is worth noting that with Local Government Reorganisation on the horizon, the properties and assets portfolio may change significantly which could open more opportunities.
12. The 2024 Centre for Local Economic Strategies (CLES) report “Embedding Community Wealth Building into Oxfordshire County Council” identifies this policy as being ‘under-utilised’ and identifies a knowledge gap on the topic of community asset transfer from within the council.¹
13. The April 2025 report “Oxfordshire: a County of Community Wealth Building” produced between the Council and local experts identified improving access to land and property for community groups as one of its calls to action, recommending that the council review and improve its CAT policy.²
14. The Performance and Corporate Services Overview & Scrutiny Committee, when scrutinising the Social Value Policy (24th February 2026), identified that the Council could be doing more to identify and promote opportunities for CAT. It also pointed out that with the incoming changes to the Council through Local Government Reorganisation and Fairer Funding Review, and due to policy initiatives such as Marmot and children’s centres grant funding, the Council should review how CAT could be used to meet these changing requirements.³
15. These new policies were developed after internal stakeholder workshops featuring representation of officers from Property and Assets, Economy and Place, Policy, Procurement and Legal.

¹ [\[Report Title\]](#) p22

² [Community wealth building report DRAFT 1](#) p9

³ [aebhdfh](#)

Proposal: Community Asset Transfer and Community Leasing Policies

16. In order to clarify and simplify, the Community Asset Transfer (CAT) policy (Annex 1) has been differentiated from Community Leasing (Annex 2). CAT will deal solely with the **transfer of ownership** of properties, whereas Community Leasing Policy (Annex 2) deals with the **leasing** of Council land or buildings at less than best consideration in order to achieve a public benefit.
17. These policies seek to recognise and maximise the benefits of the devolution of assets to local communities. They recognise supporting community groups in their work across Oxfordshire generates social value for residents and can alleviate cost and stress on Council statutory services.

Eligibility Criteria

18. CAT and Community Leasing are designed to support local organisations that provide a clear local public benefit. After consulting Council stakeholders and engaging VCS groups, it was decided that applicants would need to be one of:
 - constituted voluntary or community organisation
 - constituted group or club
 - registered charity
 - charitable incorporated organisation (CIO)
 - community interest company (CIC)
 - community benefit society (CBS)
19. The CAT and Community Leasing policies are intended to be used by local groups that need the Council's support the most. Therefore, for Community Leasing a yearly revenue cap of £2,500,000 for eligible groups has been implemented. By setting a revenue threshold, the Council ensures that Community Leasing will benefit those organisations most in need of financial support rather than larger, more well-resourced organisations.

Community Asset Transfer and Community Leasing Working Group

20. It is proposed that a Working Group is created. This group will have two main functions: assessing applications and identifying a pipeline of possible properties for CAT and Community Leasing.
21. The Working Group is designed to take a 'full council' approach and reflect the various objectives of the Council. The membership of the Working Group will be as follows:
 - (a) Property and Assets officer (nominated by the Director of Property and Assets)
 - (b) Economy and Place officer (nominated by the Director of Economy and Place with a focus on representing community wealth building and place shaping work)

- (c) Officers from service areas with asset-based programmes or projects (for example, Family Hubs or Community Hubs). These officers will sit on the Working Group for the duration of their programme and will help ensure close co-working and information sharing.
 - (d) When assessing applications, the Working Group will call in an officer relevant to the service area which a CAT or Community Leasing application relates to. This is to ensure that the Working Group is making informed decisions about applications.
22. When an application comes in, the Working Group will call in an officer who has knowledge of the service which the application relates to (if not already present in the Working Group). This is with the aim of ensuring that the contextual and technical knowledge to assess applications is present.
23. Following consideration of each proposal, the Working Group will make a formal recommendation to the Director of Property and Assets, who holds delegated authority under the Council's Scheme of Delegation to Officers to take decisions relating to the management, leasing, and disposal of Council property and assets.
24. The Director of Property and Assets will act as the final decision-maker, applying the Council's principles of decision-making and ensuring compliance with all relevant financial, legal and constitutional requirements. Where a proposal constitutes a Key Decision, it will be escalated in accordance with the Constitution.

The Assessment Criteria

25. It is important to note that as the context around each property is different, each application will be judged on a case-by-case basis. Factors such as the location, commercial value and possible Council needs will be taken into account.
26. In order to assess how strong an application is, or to choose between more than one application, assessment criteria have been developed to measure the value of proposed CATs or Community Leases to the Council. The factors taken into account are:
- (a) The social value created by the proposal. This could be exemplified by how the application supports the Council's Social Value Local Priorities, as set out in the [Social Value Policy 2026](#), or by supporting one of the [Marmot Place](#) objectives. The proposal can support one or more of these, but it does not have to support all. There is no hierarchy of which priority or objective is preferred.
 - (b) The proposed use of the property supports Council statutory services.
 - (c) If the application proposes to invest into the property.
 - (d) The applicants can evidence sound financial management.
 - (e) The proposal provides a benefit for local residents and is supported by its community.

27. The level of rent for a Community Lease will be determined by the Council on a case-by-case basis, reflecting the specific circumstances of the asset and the proposal. As each asset and application presents many distinct factors to be taken into account, it is not possible to prescribe fixed criteria to determine rent levels. In determining the level of rent, the Council will consider factors such as the current condition, market value and demand for the property, including whether it has remained vacant for an extended period, the level of investment the applicant proposes to make in the property, and how well the application meets the assessment criteria.

Long Term Reporting and Commitments

28. For Community Asset Transfers, the Council will have first refusal of properties should the VCS organisation choose to move on, ensuring that the property is being used for something that is generating a public benefit. However, beyond this a CAT is a transfer of ownership, and as such yearly reporting will not be required.
29. With Community Leasing, successful applicants will need to provide yearly evidence that the property is being used for its agreed use and that it is providing a public benefit. The intention is to ensure social value is being provided but not to create extra work for community tenants, so submitting a charity commission report, impact report of equivalent will suffice. These will be agreed on a case-by-case basis.
30. In general, Community Leasing tenants will be responsible for general 'wear and tear' maintenance costs. The level of repair and maintenance will be agreed with Community Leasing tenants at the point of application to reflect the individual circumstances of the property and the contract agreed. For example, applicants who propose to invest more into a property may be recognised via a larger rent concession.

Corporate Policies and Priorities

31. These policies support the Council's Strategic Plan 2025-28 objectives of working for a Greener, Fairer and Healthier Oxfordshire. They do this by empowering local community groups by supporting them to access property throughout the county.
32. Marmot Place - Oxfordshire is a Marmot Place - CAT and Community Leasing contribute towards this by empowering local communities to generate social benefits in their local spaces.
33. Property and Assets Strategy 2022 - Any CAT or Community Leasing decisions need to fit within the County Council's 2022 Property and Assets Strategy. This strategy sets out the ten-year ambition for the County Council's property portfolio to create an efficient, innovative and accessible property estate which delivers climate action objectives and generates social value for residents.

Financial Implications

34. The terms of the proposal have been assessed to be compliant with the best value requirements as set out in section 123 of the Local Government Act 1972.

Comments checked by:

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Legal Implications

35. Because of Section 123 of the Local Government Act 1972, unlike private and commercial landowners, who are free to buy, sell or lease land at whatever price they choose, a local authority cannot dispose of its land for a consideration less than the best that can be reasonably obtained in the market, except with the express consent of the Secretary of State.
36. Section 123 does not apply however to short leases of under 7 years.
37. The Secretary of State has given express consent for “undervalue” disposals that local authorities consider will secure the promotion or improvement of the economic, social or environmental well-being of their areas, providing that the “undervalue” is not more than £2m (see the General Disposal Consent referred to above).
38. In practice:
- (a) Although Section 123 does not apply to short leases of under 7 years, the Council remains under a duty to maximise its revenues and so the same caution should be applied to granting such leases at an “undervalue” as those of over 7 years.
 - (b) “Subsidy Control” legislation is not overridden by the above and the Council needs to ensure that by transacting at an undervalue it is not creating an unfair subsidy (e.g. providing premises cheaply to a charity providing paid counselling services which is competing with a private sector organisation supplying similar services).
 - (c) The Council is always at risk of judicial review in the exercise of its discretions, so needs to keep a clear record of its assessment processes and criteria and for those making decisions to have a clear understanding in each case as to the extent of the “undervalue” involved (by noting the difference between the proposed consideration and the potentially achievable consideration).
 - (d) The Council needs to be aware that unrelated legislation restricts it from disposing of certain types of land it owns (eg the School Standard and Framework Act 1998 in respect of school playing fields) and that legislation still needs to be fully complied with before any disposal takes place.

- (e) Those administering the policies need to be aware that freehold transfers are fundamentally different to leases – leases are finite in length and enable the Council (as landlord) directly to manage what is done in a property and terminate them should the tenant not do what is expected. Freehold transfers involve the Council giving up ownership and control forever (although certain limited steps can be taken to try and retain control).

Richard Hodby, Solicitor (Law and Governance)
richard.hodby@oxfordshire.gov.uk

Staff Implications

- 39. These policies are procedural and do not require any new or additional staffing resources. The only changes they may make would be possible extra responsibilities for officers sitting on the working group.

Equality & Inclusion Implications

- 40. An Equality Impact Assessment has been completed for these policies (Annex 3). This assessment does not identify negative impacts. Outcomes will be dependent on which VCS groups apply for a CAT or Community Lease.

Sustainability Implications

- 41. A Climate Impact Assessment has been completed for these policies (Annex 4). This assessment identifies a positive impact.

Risk Management

- 42. Key risks and mitigations include:
 - (a) Implementation risk – These policies might be implemented inconsistently. Mitigation – all CAT or Community Leasing applications will be assessed via the same assessment criteria. The Working Group, which will assess applications, will feature officers from service area relevant to the application to ensure the requisite knowledge to assess them is present.
 - (b) Financial risk – Community Leases or CATs pose a reduction of possible Council rent receipts or capital receipts. Mitigation – Property and Assets officers have to put properties onto a list for them to be eligible. Final sign off also sits with the Director for Property and Assets to ensure that all final decisions are compliant with the Property and Assets strategy. Successful applicants also have to provide in their application proof of their business plan to safeguard the proposed use of the property.

- (c) Risk of improper use of Community Leasing properties –Community Leasing tenants might change their use of the property, meaning that the public benefit / social benefit that the rent reduction was granted to recognise is no longer being generated. Mitigation – Community Leasing tenants are required to provide their charity commission report, impact report or equivalent document in order to demonstrate that through their use of the property a public benefit is being provided for the local community.
 - (d) Improper use of a Community Asset Transfer – a successful CAT applicant might look to sell the property that they were devolved via a CAT for a private profit. This would mean that the property has left the public estate, and there is no local benefit being provided through it. Mitigation – clauses will be implemented in CAT contracts that give the Council first refusal for the property.
43. These policies address the current risk of rent reductions being administered in a non-uniform manner.
44. It should also be noted that these policies only introduce the mechanism by which CATs or Community Leases can take place. Before each individual CAT or Community Lease that the council enters into, the proper and sufficient due diligence will be undertaken.

Consultations

45. Development of the policy was informed by internal workshops with colleagues from Property and Assets, Policy, Commercial and Procurement, Legal, and Economy and Place.
46. A VCS engagement period was undertaken from 08/02/2026 – 09/03/2026 through a Let's Talk Oxfordshire survey. This survey was shared with VCS organisations through our VCS infrastructure partners Oxfordshire Community and Voluntary Action (OCVA) and with Community First Oxfordshire (CFO).
47. A webinar was run on 05/03/2026 which VCS organisations could join to give feedback and ask questions. This was attended by senior Property and Assets colleagues. This webinar was also advertised through OCVA and CFO's channels.
48. Feedback and changes made included:
- (a) Expanding upon the Assessment Criteria to include specific objectives that included children 0-5. Marmot Place principles were included to reflect this, and clarification was added that applications do not have to support more than one priority.
 - (b) Clarifying that the Council is open to long-term leases (such as 10 or 20 years), which are beneficial to VCS organisations as they can enable them to access extra funding.
 - (c) Clarifying that ad-hoc hiring out of properties is permitted but clarifying that subletting requires formal consent first.

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COMMUNITY ASSET TRANSFER POLICY 2026

OXFORDSHIRE
COUNTY
COUNCIL

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1.0 Introduction

Oxfordshire County Council (“the Council”) Community Asset Transfer (CAT) Policy seeks to recognise and maximise the benefits of the devolution of assets to local communities.

The Local Government Association defines a CAT as: *‘transferring the ownership of land or buildings from a statutory body to a Community Organisation at “less than best consideration” – that is at less than its full market value – in order to achieve a public benefit’*.

This policy sets out OCC’s approach to CAT. It outlines the principles behind community asset transfers together with details of who is eligible to apply, what support will be provided to assist organisations seeking to take a transfer and how proposals will be assessed. It also sets a clear process for CAT applications.

An asset is defined as a building and/or land owned by the Council.

CAT differs from Community Leasing as CAT deals with **transfer of ownership** of assets for less than best consideration. Community Leasing refers to the **leasing** of assets to community groups for less than best consideration. See the Community Leasing Policy 2026 for more information on community leasing.

This policy replaces the Community Asset Transfer Policy 2019. It does this by differentiating between Community Asset Transfer and Community Leasing and further clarifies the application process.

1.1 The National Policy Context

When making decisions with regard to our asset portfolio, the Council needs to be mindful of the following legislation:

- **The Local Government Act 1973** s123 requires councils to obtain the “best consideration reasonably obtainable” when disposing of land or buildings.
- **General Disposal Consent (England) 2003** gives permission for Councils to dispose at less than best consideration, provided that the undervalue is less than £2m (in capital terms), **and** the transfer benefits the economic, social, or environmental well-being of the area.

1.2 CAT in the Oxfordshire County Council Policy Landscape

Strategic Plan 2025-2028

One of the three core pillars for the [2025-28 Strategic Plan](#) is ‘Fairer’, ensuring that the local economy benefits everyone, our services are as easy to access as possible and that we help communities in need. CAT enables more community groups to have access to local facilities and thrive in our county.

Property and Assets Strategy 2022

Any CAT decisions need to fit within the Council's 2022 Property and Assets Strategy. This strategy sets out the ten-year ambition for the Council's property portfolio to create an efficient, innovative and accessible property estate which delivers climate action objectives and generates social value for residents.

Marmot Place

Oxfordshire is a Marmot Place - a programme of work across public sector partners, businesses and voluntary sector organisations which aim to tackle health inequalities and improve health fairness in Oxfordshire. CAT contributes towards this by empowering local communities to generate social benefits in their local spaces.

Delivering the Future Together

As part of the Delivering the Future Together agenda, the Council is committing to becoming a place shaper and partner of choice. This means working proactively with our voluntary sector to help them thrive throughout the county.

1.3 When will a property or asset be applicable for Community Asset Transfer?

The Council has a large and varied property and assets portfolio, with most of the estate used for corporate purposes, let, or held for redevelopment or sale.

When an asset is identified as being surplus to the Council's requirements, consideration will be given as to whether there is an alternative requirement internally or if the asset is required in the longer term. Not all assets are deemed suitable for asset transfer and there are some that will be reserved for the commercial disposal route, generating a capital receipt for the Council. Assets which have the potential to generate significant capital receipts are less likely to be considered as suitable for a CAT.

In general, assets will be made available for transfer unless one of the following principles applies:

- a. Property revenue savings or capital receipts from the property are essential to contribute to Council savings.
- b. There is another Council need for the property which would be financially disadvantageous to meet in any other way.
- c. The asset is leased by the Council.
- d. The property has already been identified for utilisation under One Public Estate.
- e. Grant conditions for capital expenditure on the property prevent the property being transferred or prevent a change of use within a specified timescale.
- f. The proposed use and terms of the transfer would result in a liability upon the Council to repay grant monies.
- g. The condition of the asset is not deemed fit for purpose or does not meet the current Minimum Energy Efficiency Standards without capital investment.
- h. The proposed use is not compatible with the existing or intended use of adjacent Council retained land/buildings.

1.4 Eligibility

You can apply if your organisation has a significant social or environmental benefit to residents of Oxfordshire. You are eligible to apply if you are a:

- constituted voluntary or community organisation
- constituted group or club
- registered charity
- charitable incorporated organisation (CIO)
- community interest company (CIC)
- community benefit society (CBS)

See section 3.1 for the Assessment Criteria by which applications will be judged

2.0 Principles of CAT

1. Transparent

- We will be open about the properties that we have available. They will be advertised on the Council website at: [Council land and buildings | Oxfordshire County Council](#). The CAT / Community Leasing Working Group will review this list quarterly, and update it whenever appropriate properties are identified.
- We will be open and clear about the application progress, as well as the timescale of the process, and will respond to all applications as quickly as possible.
- We will be open about the criteria which we judge applications against. (See section 3.1)

2. Fair

- We will be open to applications from all eligible groups.
- We will judge all applications against our assessment criteria (see section 3.1)

3. Accountable

- All final decisions regarding a CAT will be made through the CAT / Community Leasing Working Group, taking into account the needs from across the Council.
- Any accepted CAT will be financially sustainable and not incur ongoing costs for the Council.
- We will ask that all applications demonstrate a sound business plan that shows how community partners will be able to care for the asset.

2.1 CAT / Community Leasing Working Group

To enable full oversight for opportunities for CAT and to enable a cross-Council view, a CAT and Community Leasing Working Group will be established. Membership of the Working Group will be comprised of:

- Properties and Assets officer. Nominated by the Director of Properties and Assets. This officer will chair the Working Group.

- Economy and Place officer. Nominated by the Director of Economy and Place. This officer will represent the Council's place shaping and community wealth building objectives.
- Asset-based programmes. An officer from relevant service areas with asset-based programmes or projects (such as Family Hubs or Community Hubs) will be invited to sit on the Working Group for the duration of the programme.
- Relevant service area. Where necessary, the Working Group will call in an officer relevant to the service area which a CAT or CL application relates to. This is to ensure that the Working Group is making informed decisions about the possible benefits of applications.

The Working Group's first function will be to identify properties suitable for CAT / Community Leasing, and to maintain and update the published list of available properties. The Working Group will meet quarterly to review this list. It will keep a record of any requests that VCS groups have made for properties to be added to the list, which will feed into decision making.

The Working Group's second function will be to assess applications, using the Assessment Criteria set out in Section 3.1. A multi-Service approach will be taken, so that services relevant to the VCS group applying are present to help assess the application.

Following consideration of each proposal, the Working Group will make a formal recommendation to the Director of Property and Assets, who holds delegated authority under the Council's Scheme of Delegation to Officers to take decisions relating to the management, leasing, and disposal of Council property and assets.

The Director of Property and Assets will act as the final decision-maker, applying the Council's principles of decision-making and ensuring compliance with all relevant financial, legal and constitutional requirements. Where a proposal constitutes a Key Decision, it will be escalated in accordance with the Constitution.

3.0 The Application Process

- 1.) A list of available properties will be published online at: [Council land and buildings | Oxfordshire County Council](#). If you have any questions regarding any of these properties, please contact: Estates.Enquiries@Oxfordshire.gov.uk. Members will be informed of any properties in their wards that have been designated for Community Asset Transfer.
- 2.) If you would like to apply for a CAT, you will need to fill in a Full Application form (See Annex 1). This form goes into detail about your intended use for the asset, as well as your business plan. Please ensure that you have read the full CAT policy – in particular ensure that your organisation is eligible (1.4 Eligibility) and refer to Section 3.1 Assessment Criteria for how your Full Application will be judged.
- 3.) The CAT / Community Leasing Working Group will evaluate your application against the assessment criteria and arrive at a recommendation that will be

put forward for decision. Members will be informed of any applications made for properties within their wards.

- 4.) The CAT / Community Leasing Working Group will inform you in writing of the decision.

Only applications for properties published online as available for CAT or Community Leasing will be considered. However, organisations are encouraged to indicate interest in a Council owned property for future CAT or Community Leasing by emailing Estates.Enquiries@Oxfordshire.gov.uk. A log will be maintained of all notices of interest, which will be used to inform future decision making.

It is the responsibility of the CAT / Community Leasing Working Group to respond to each stage of the application process in a timely manner, and to communicate each stage with the applicant.

Preparing the information and documents required for the application form can be a lengthy and time-consuming process. Once the Full Application has been submitted, the Council will aim to get Heads of Terms (a non-binding summary of key terms agreed before drafting a full housing contract) agreed and solicitors instructed as soon as possible.

3.1 Assessment Criteria

The CAT / Community Leasing Working Group will consider each Business Proposal made against the following criteria:

- a) The proposed use for the asset will generate significant social value for the county. This could be through supporting:
 - The Council's Social Value Local Priorities, as established in the Social Value Policy. These can be found here: [Social Value Policy | Oxfordshire County Council](#)
 - The Council's Marmot Place objectives. These can be found here: [Oxfordshire as a Marmot Place | Oxfordshire County Council](#)
 - Please note, applications do not need to support multiple priorities, and there is no hierarchy of which priorities are preferable.
- b) The proposal supports the Council to deliver its statutory services or makes a cost saving for the Council by supporting a statutory service.
- c) The application proposes to invest into the repair or improvement of the property.
- d) They have a viable business plan that covers the costs of holding the property and managing it effectively OR an evidenced track record of good financial management.
- e) There is evidence of community need and support for the proposal
- f) The proposal will be focused on providing a clear long-term benefit to the local community, rather than a national focus.
- g) The proposal comes from an appropriately constituted organisation (see section 1.4)

Particular weight will be given to applications that support the Council's priorities. Service areas will be consulted on applications that are related directly to their services in order to assess the level of potential impact.

3.2 Long-term considerations

First refusal

CAT contracts will also contain provisions which ensure that the Council have first refusal should the successful CAT applicant choose to move on from the property. These will be at the same value of the asset as originally set out in the originally CAT – i.e., if a property is transferred at peppercorn rate, it will be returned as such. This is to guarantee that the long-term value and use of this asset is retained by the public.

Appendix 1: Full Application

Community Asset Transfer Full Application

1. The Asset

Name of Asset

Address of Asset

2. Details of the organisation making the application

Name of Organisation

Address of Organisation

Telephone number

Email address

3. Contact Details

Your name

Contact address

Telephone number

Email address

Position in the Organisation

4. Organisation Structure

What kind of organisation are you?
E.g., Registered charity, Community Interest Company etc. See Section 1.4 Eligibility.

Charity / Company number:

5. Governance

When was your organisation established?

Does your organisation have a written constitution, governing document, or set of rules?
If yes, please attach to this document

Yes

No

How many people are involved in your organisation in the following positions?

Management committee		Paid full time staff	
Paid part time staff		Volunteers	

Please tell us the type of insurance your organisation holds and provide the levels of cover.
E.g., Public Liability, Employer Liability, Professional Indemnity

6. Terms of Request

What price are you prepared to pay for the asset requested?

Proposed price:

£

Please attach a note setting out any other terms and conditions you wish to apply to the request

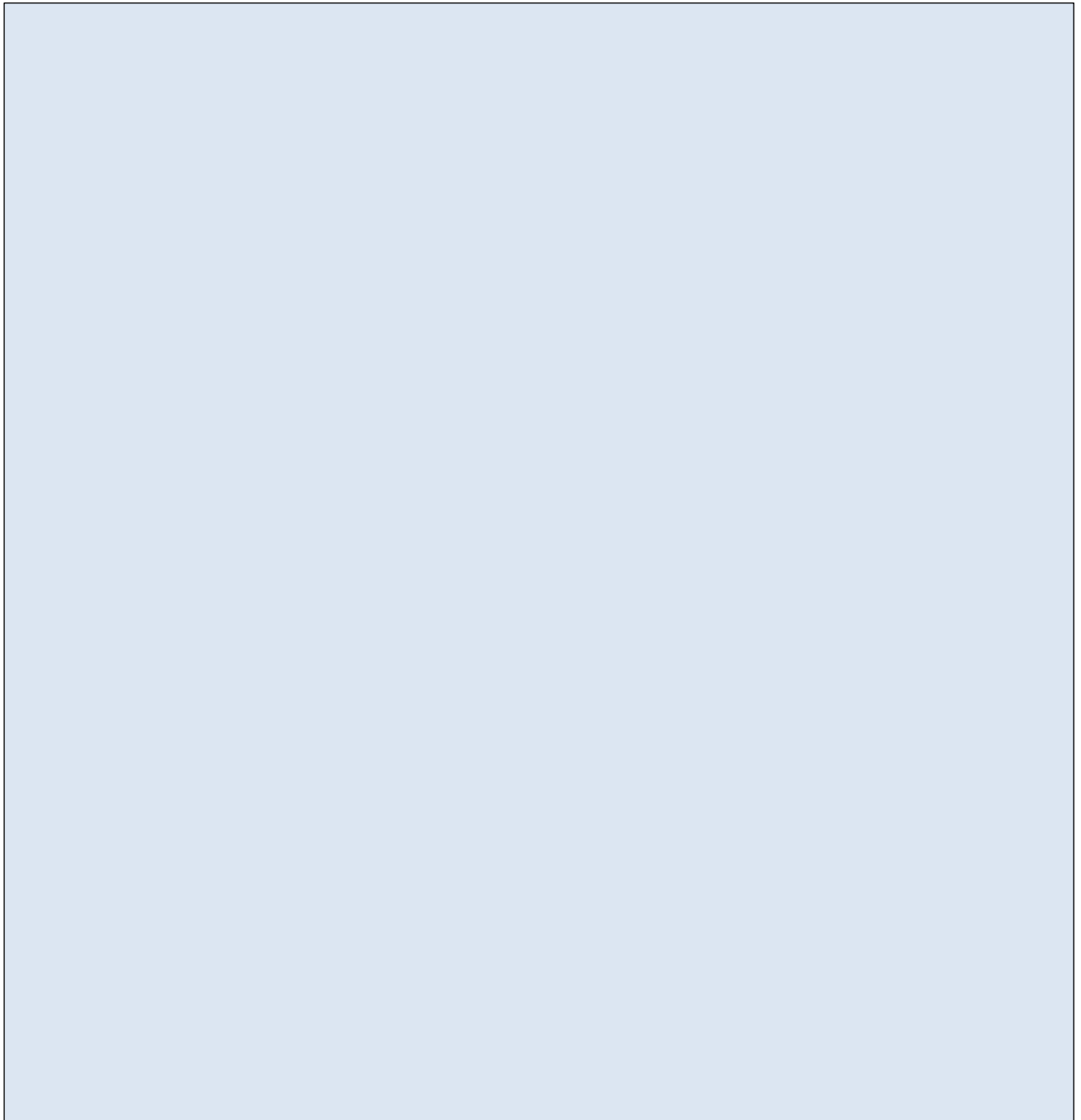
7. Business Plan

For the following section, refer to Section 3.1 to read the Assessment Criteria which will be used to judge your application.

7.1 Use - Set out how you plan to use the asset. Explain the objectives of your project, why there is a need for it, and any activities that will take place there. Please also include your budget for the first year of the lease.

Please note that all applicants will be required to meet statutory consents (the legally required approvals that must be obtained before the CAT can take place, such as planning permission, building regulations, listed building consent or licensing).

(500 words max)



7.2 Funding

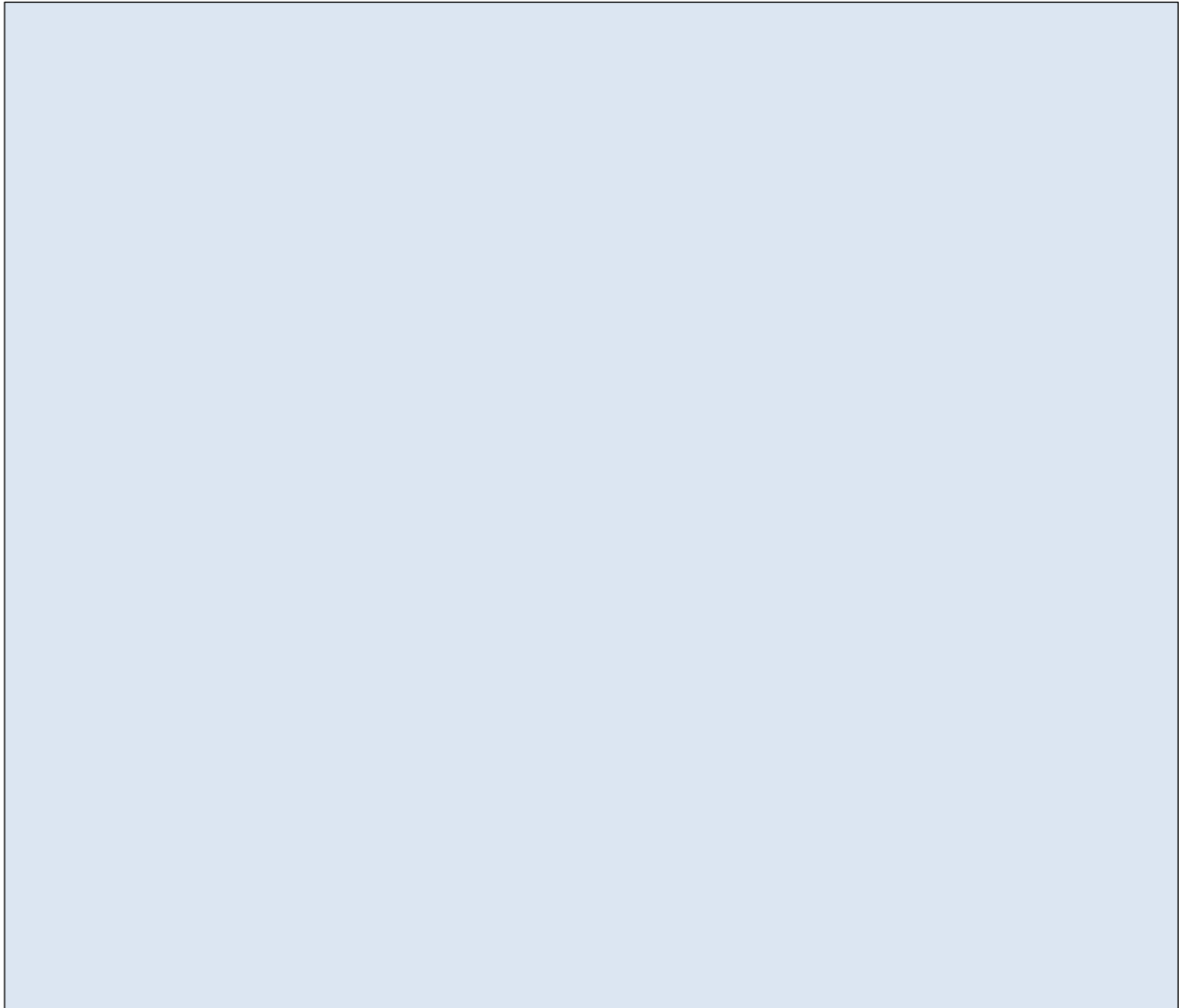
Lay out how you intend to fund the running of the property, as well as any repairs / development.

Established groups will need to provide accounts that demonstrate three years of good financial management.

For new groups, please provide an outline of how you propose to fund the rent you are prepared to pay for the land, as well as how you are going to hold the property and manage it effectively. You should show your calculations of the costs associated with the transfer of the land or building and your future use of it, including any redevelopment, ongoing maintenance and the costs of your activities. *

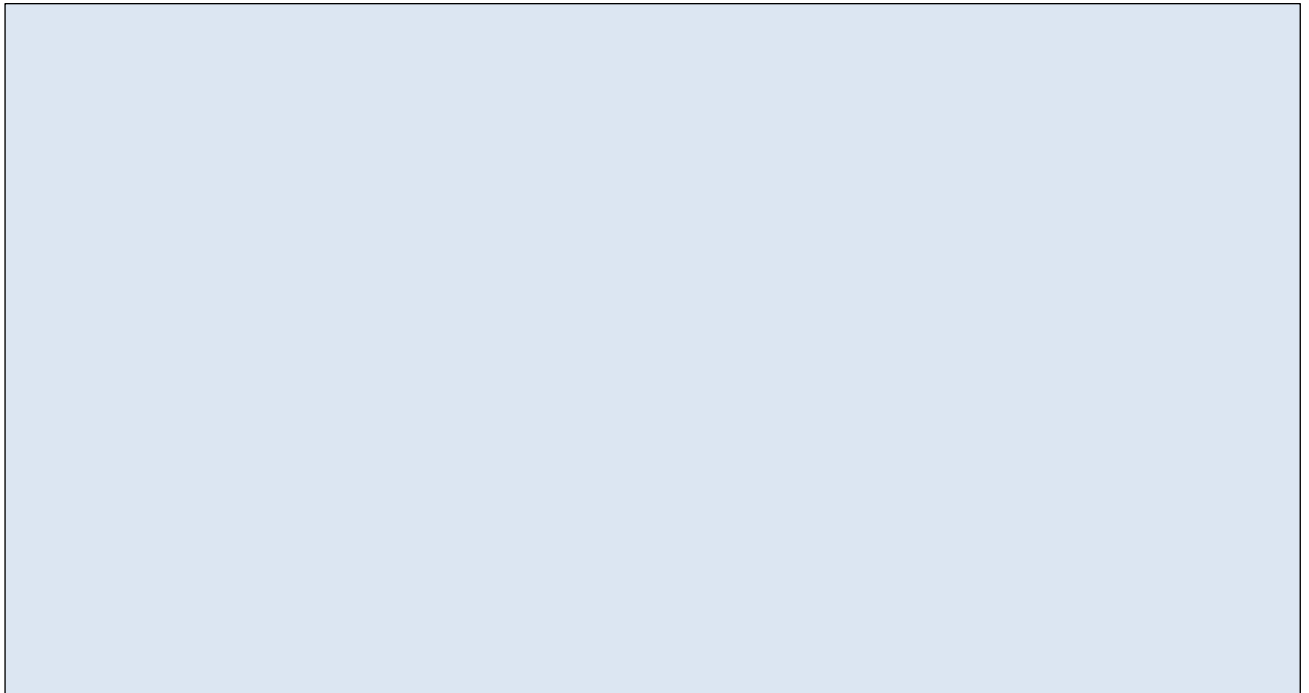
**Please note that Council grant funding cannot be used to fund rent or planned investment or repairs.*

(250 words max)



7.3 Investment / Development

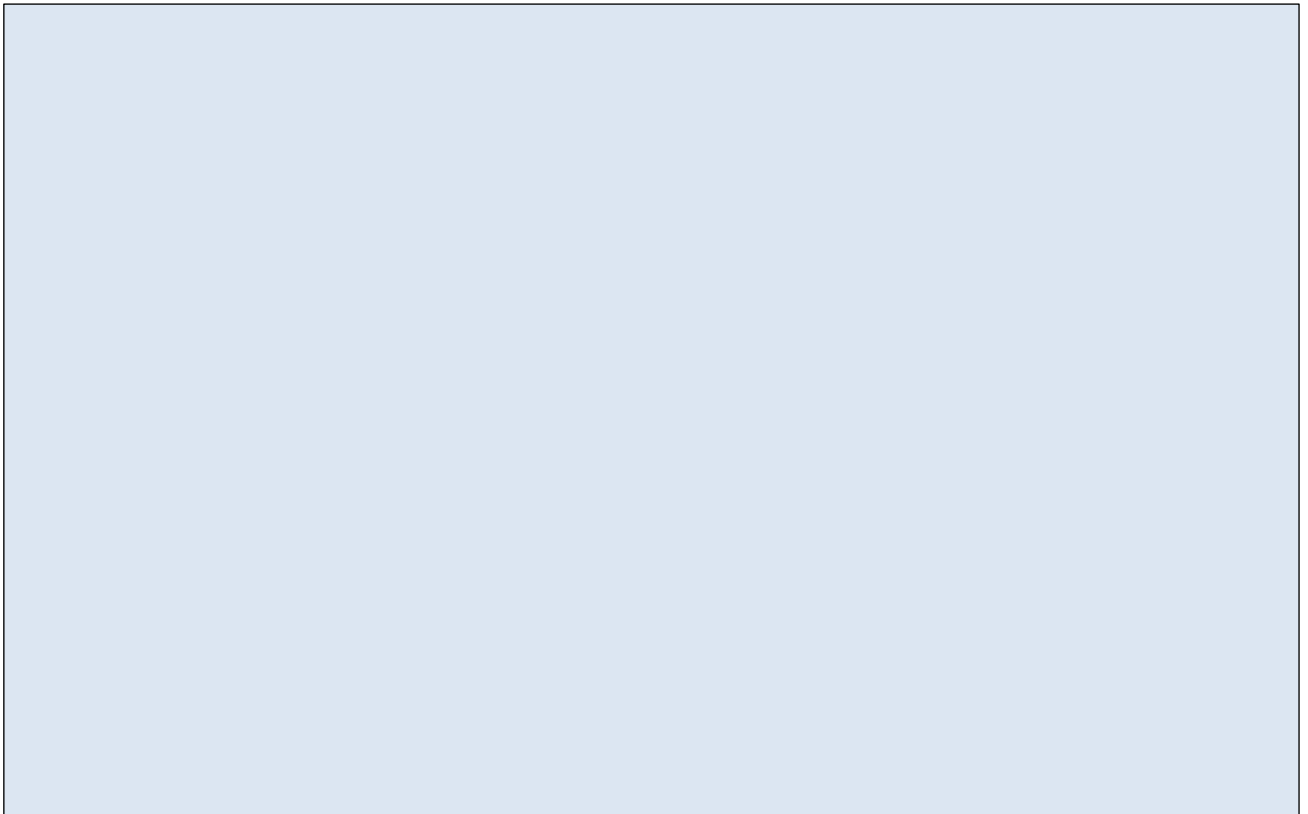
Please set out any investment, development or changes you plan to make to the land or building. (250 words)



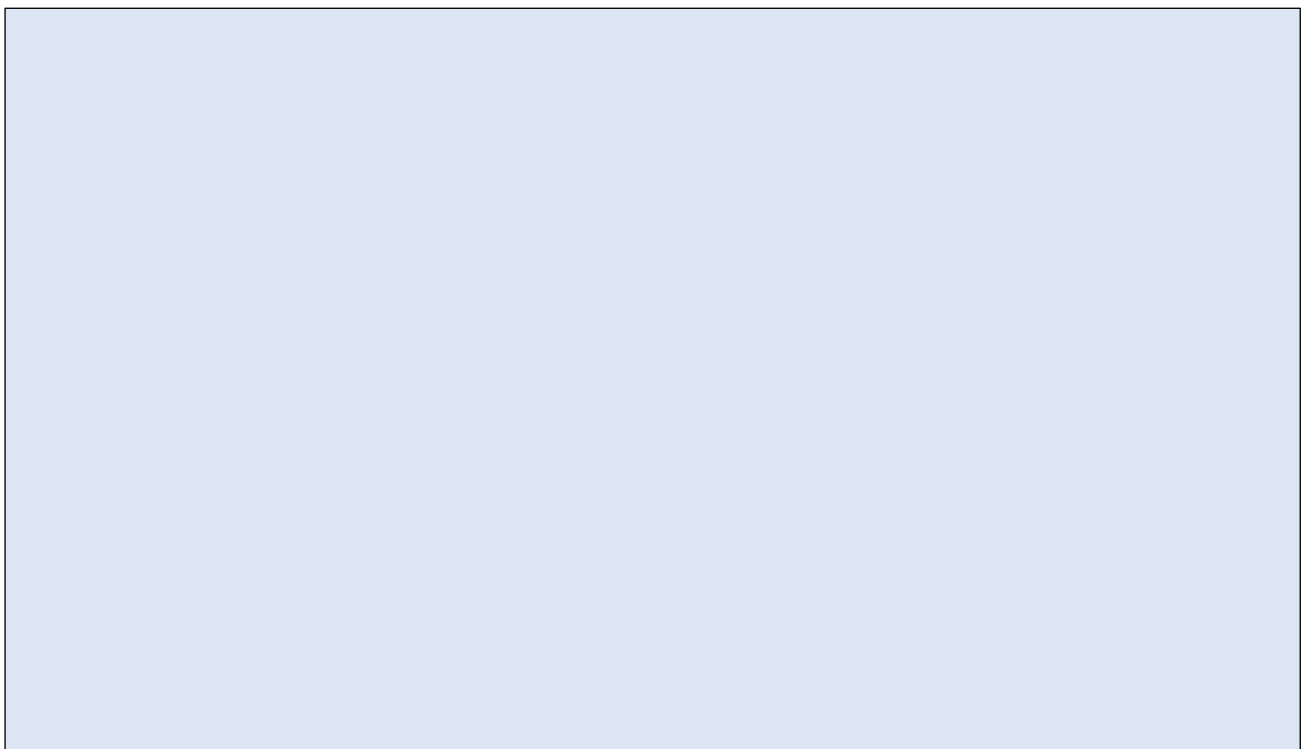
7.4 Social Value – Please set out the social value that will be generated should your application be approved. Consider how your proposal might generate social, economic or environmental benefits for the local community. Consider how your proposal will support either the Council’s Social Value Local Priorities (found in the [Social Value Policy](#)) or [Marmot Place](#) objectives. If applicable, also detail how your proposal would support the Council to deliver any of its statutory services.

Please note that applications do not need to support multiple priorities, and there is no hierarchy of which priorities are preferable.

(500 words max)



7.5 Negative consequences – What negative consequences (if any) may occur if your request is agreed to? How would you propose to minimise these? You should consider any potential negative consequences for the local economy, environment, or any group of people, and explain how you could reduce these. (250 words)

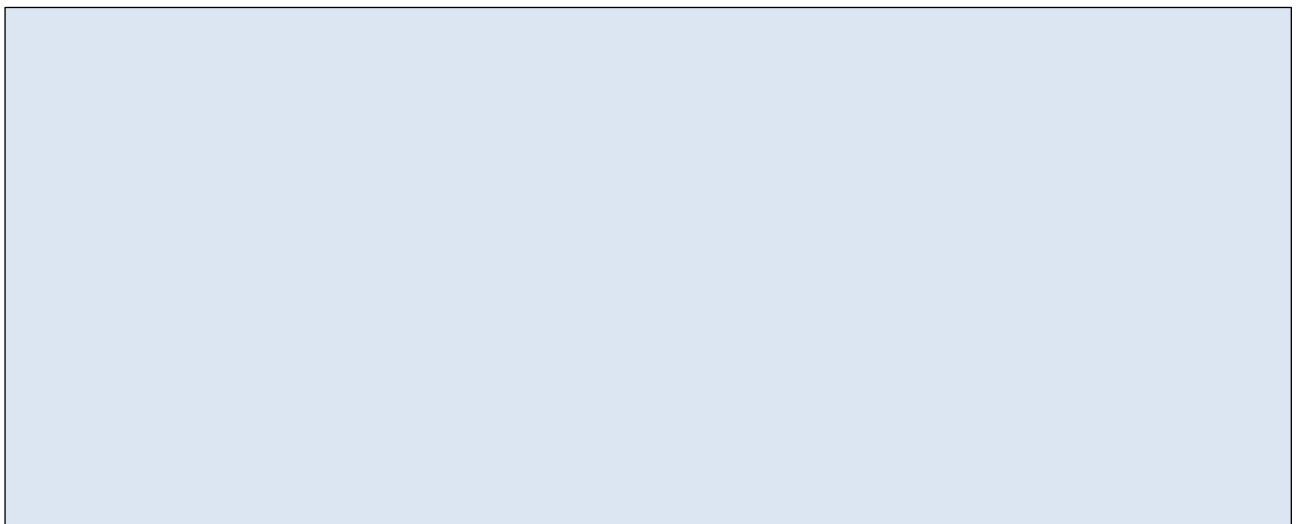


7.6 Level and Nature of Support - Please provide details of the level and nature of support for the request, from your community and, if relevant, from others. This could include information on the proportion of your community who are involved with the request, how you have engaged with your community beyond the members of your organisation and what their response has been. (250 words max)



8. Equalities and Inclusion

How will you ensure that your services / activities are accessible for everyone in your community? (250 words max)



Completed application should be emailed to: Estates.Enquiries@Oxfordshire.gov.uk

COMMUNITY LEASING POLICY 2026

OXFORDSHIRE
COUNTY
COUNCIL

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1.0 Introduction

Community Leasing is the leasing of an asset from Oxfordshire County Council ('the Council') at "less than best consideration" – that is less than its full market value – in order to achieve a public benefit. This public benefit can come through the value generated from social, environmental or economic programmes for local communities.

An asset is defined as a building(s) and/or land owned by the Council.

How does it differ from traditional leasing?

Firstly, Community Leasing is only possible for community groups and charities (see "Eligibility" for more details) – for-profit entities are not able to access Community Leases. Secondly, Community Leases are only possible for groups that are able to demonstrate a clear social benefit that they are providing, which allows the Council to justify forgoing "best consideration" – full market value.

How does it differ from Community Asset Transfer?

Community Asset Transfer (CAT) deals with **transfer of ownership** of assets for less than best consideration. Community Leasing refers to the **leasing** of assets to community groups for less than best consideration.

Please refer to the Community Asset Transfer Policy 2026 for more on CATs.

1.1 The National Policy Context

When making decisions with regard to our asset portfolio, the Council needs to be mindful of the following legislation:

- **The Local Government Act 1973** s123 requires councils to obtain the "best consideration reasonably obtainable" when disposing of land or buildings.
- **General Disposal Consent (England) 2003** gives permission for councils to dispose at less than best consideration, provided that the undervalue is less than £2m (in capital terms), and the transfer benefits the economic, social, or environmental well-being of the area.

1.2 Community Leasing in the Oxfordshire County Council Policy Landscape

Strategic Plan 2025-2028

One of the three core pillars for the [2025-28 Strategic Plan](#) is 'Fairer', ensuring that the local economy benefits everyone, our services are as easy to access as possible and that we help communities in need. Community Leasing enables more community groups to have access to local facilities and thrive in our county.

Property and Assets Strategy 2022

Any Community Leasing decisions need to fit within the Council's 2022 Property and Assets Strategy. This strategy sets out the ten-year ambition for the Council's property portfolio to create an efficient, innovative and accessible property estate which delivers climate action objectives and generates social value for residents.

Marmot Place

Oxfordshire is a Marmot Place - a programme of work across public sector partners, businesses and voluntary sector organisations which aim to tackle health inequalities and improve health fairness in Oxfordshire. Community Leasing contributes towards this by empowering local communities to generate social benefits in their local spaces.

Delivering the Future Together

As part of the Delivering the Future Together agenda, the Council is committing to becoming a place shaper and partner of choice. This means working proactively with our voluntary sector to help them thrive throughout the county.

1.3 When will we do Community Leasing?

The Council has a large and varied portfolio of property and land, with most of the estate used for corporate purposes, let, or held for redevelopment or sale.

When a Council-owned building or land (an asset) is identified as being surplus to the Council's requirement, consideration will be given to whether there is an alternative requirement internally or if the asset is required in the longer term. Not all assets are deemed suitable for Community Leasing and there are some that will be reserved for the commercial disposal route, generating revenue or a capital receipt for the council. Assets which have the potential to generate significant capital receipts are less likely to be considered as suitable for Community Leasing.

Community Leasing is preferred when an asset has been identified as important to the long-term future of the Council, but in the short-term is not needed. It is therefore in the public interest to retain it as part of the Council asset portfolio, whilst enabling a community group to maximise its use in the meantime.

In general, assets will be made available for Community Leasing unless one of the following principles applies:

- a) Property revenue savings or capital receipts from the property are essential to contribute to Council savings.
- b) There is another Council need for the property which would be financially disadvantageous to meet in any other way.
- c) The asset is leased in by the Council.
- d) The property has already been identified for utilisation under One Public Estate.
- e) Grant conditions for capital expenditure on the property prevent the property being leased or prevent a change of use within a specified timescale.
- f) The proposed use and terms of the lease would result in a liability upon the Council to repay grant monies.
- g) The condition of the asset is not deemed fit for purpose or does not meet the current Minimum Energy Efficiency Standards without capital investment.
- h) The proposed use is not compatible with the existing or intended use of adjacent Council retained land/buildings.

- i) If engaging in Community Leasing would cause the Council to incur significant future costs that would be needed for the building to be operational – e.g., roof repairs or central heating.

1.4 Eligibility

You can apply if your organisation has a significant social or environmental benefit to residents of Oxfordshire. You are eligible to apply if you are a:

- constituted voluntary or community organisation
- constituted group or club
- registered charity
- charitable incorporated organisation (CIO)
- community interest company (CIC)
- community benefit society (CBS)

Community Leases are intended to support the VCS groups that need it the most to access property within the county. Therefore, organisations that have a yearly revenue of over £2,500,000 will not be considered eligible. By setting a revenue threshold, the Council ensures that Community Leasing benefits those organisations most in need of financial support rather than well-resourced, larger organisations.

See section 3.1 for the Assessment Criteria by which applications will be judged.

2.0 Principles of Community Leasing

To ensure that maximum value is obtained from Community Leases, for both the Council and the community sector, our approach to Community Leasing will be shaped by the following principles:

- 1. Transparent**
 - We will be open about the properties that we have available. They will be advertised on the Council website at: [Council land and buildings | Oxfordshire County Council](#). The CAT / Community Leasing Working Group will review this list quarterly, and update it whenever appropriate properties are identified.
 - We will be open and clear about the application progress, as well as the timescale of the process, and will respond to all applications as quickly as possible.
 - We will be open about the criteria which we judge applications against. (See section 3.1)
- 2. Fair**
 - We will be open to applications from all eligible groups.
 - We will judge all applications against our assessment criteria (see section 3.1)
- 3. Accountable**
 - The CAT / Community Leasing Working Group will assess all applications and represent the needs from across the Council.
 - Any accepted community lease will be financially sustainable and not incur ongoing costs for the Council.

- We will ask that all applications demonstrate a sound business plan that shows how community partners will be able to care for the asset.

2.1 CAT / Community Leasing Working Group

To enable full oversight of opportunities for CAT and to enable a cross-Council view, a CAT and Community Leasing Working Group will be established. Membership of the Working Group will be comprised of:

- Properties and Assets officer. Nominated by the Director of Properties and Assets. This officer will chair the Working Group.
- Economy and Place officer. Nominated by the Director of Economy and Place. This officer will represent the Council's place shaping and community wealth building objectives.
- Asset-based programmes. An officer from relevant service areas with asset-based programmes or projects (such as Family Hubs or Community Hubs) will be invited to sit on the Working Group for the duration of the programme.
- Relevant service area. Where necessary, the Working Group will call in an officer relevant to the service area which a CAT or CL application relates to. This is to ensure that the Working Group is making informed decisions about the possible benefits of applications.

The Working Group's first function will be to identify properties suitable for CAT / Community Leasing, and to maintain and update the published list of available properties. The Working Group will meet quarterly to review this list. It will keep a record of any requests that VCS groups have made for properties to be added to the list, which will feed into decision making.

The Working Group's second function will be to assess applications, using the Assessment Criteria set out in Section 3.1. A multi-Service approach will be taken, so that services relevant to the VCS group applying are present to help assess the application.

Following consideration of each proposal, the Working Group will make a formal recommendation to the Director of Property and Assets, who holds delegated authority under the Council's Scheme of Delegation to Officers to take decisions relating to the management, leasing, and disposal of Council property and assets.

The Director of Property and Assets will act as the final decision-maker, applying the Council's principles of decision-making and ensuring compliance with all relevant financial, legal and constitutional requirements. Where a proposal constitutes a Key Decision, it will be escalated in accordance with the Constitution.

3.0 The Application Process

- 1.) A list of available properties will be published online at: [Council land and buildings | Oxfordshire County Council](#). If you have any questions regarding

any of these properties, please contact:

Estates.Enquiries@Oxfordshire.gov.uk . Members will be informed of any properties in their wards that have been designated for Community Leasing.

- 2.) If you would like to apply for a Community Lease, you will need to fill in a Full Application form (See Annex 1). This form goes into detail about your intended use for the asset, as well as your business plan. Please ensure that you have read the full Community Leasing policy – in particular ensure that your organisation is eligible (1.4 Eligibility) and refer to Section 3.1 Assessment Criteria for how your Full Application will be judged.
- 3.) The CAT / Community Leasing Working Group will evaluate your application against the assessment criteria and arrive at a recommendation that will be put forward for decision.
- 4.) The CAT / Community Leasing Working Group will inform you in writing of the decision.

Only applications for properties published online as available for CAT or Community Leasing will be considered. However, organisations are encouraged to indicate interest in a Council owned property for future CAT or Community Leasing by emailing Estates.Enquiries@Oxfordshire.gov.uk. A log will be maintained of all notices of interest, which will be used to inform future decision making.

It is the responsibility of the CAT / Community Leasing Working Group to respond to each stage of the application process in a timely manner, and to communicate each stage with the applicant.

Preparing the information and documents required for the application form can be a lengthy and time-consuming process. Once the Full Application has been submitted, the Council will aim to get Heads of Terms (a non-binding summary of key terms agreed before drafting a full housing contract) agreed and solicitors instructed as soon as possible.

3.1 Assessment Criteria

The CAT / Community Leasing Working Group will consider each Business Proposal made against the following criteria:

- a) The proposed use for the asset will generate significant social value for the county. This could be through supporting:
 - The Council's Social Value Local Priorities, as established in the Social Value Policy. These can be found here: [Social Value Policy | Oxfordshire County Council](#)
 - The Council's Marmot Place objectives. These can be found here: [Oxfordshire as a Marmot Place | Oxfordshire County Council](#)
 - Please note, applications do not need to support multiple priorities, and there is no hierarchy of which priorities are preferable.
- b) The proposal supports the Council to deliver its statutory services or makes a cost saving for the Council by supporting a statutory service.
- c) The application proposes to invest into the repair or improvement of the property.

- d) They have a viable business plan that covers the costs of holding the property and managing it effectively OR an evidenced track record of good financial management.
- e) There is evidence of community need and support for the proposal
- f) The proposal will be focused on providing a clear long-term benefit to the local community, rather than a national focus.
- g) The proposal comes from an appropriately constituted organisation (see section 1.4)

Particular weight will be given to applications that support the Council's priorities. Service areas will be consulted on applications that are related directly to their services in order to assess the level of potential impact.

3.2 Contract Types

General Terms

Leases will be considered on a case-by-case basis according to each asset's location and circumstances. For example, a property that is currently empty is far more likely to be considered for Community Leasing. The state of repair of the asset, and therefore its future associated costs, will also be considered.

In order to protect the long-term use of properties which have been identified as applicable for Community Leasing, some general terms will apply to any agreements:

- Contracts will be for a minimum of three (3) years, with a standard lease being seven (7) years. Leases will contain a break clause as standard.
- The Council recognises that long leases can be beneficial for VCS groups to attract grant funding. The Council is open to long term Community Leases (e.g., 10 or 20 years), as long as they comply with Council service requirements and the factors set out in section 1.3.
- Tenants will be given a "photographic schedule of condition" noting the condition of the building at the beginning of the lease.
- Contracts will be non-assignable, meaning contracts cannot be transferred to another party. Community Leases are only granted due to the public benefits provided by the application of community groups, so they cannot be passed on to different parties that have not been through this application process.
- Ad-hoc hiring out of the property is permitted, but no subletting will be permitted without formal consent. Part subletting to support the agreed use of the property will generally be agreed, provided the property is still being used to provide the public benefit as set out in the applicant's business plan.
- There will be no security of tenure. Community Leasing contracts are granted when the Council need to retain ownership of an asset in the long run but have identified that in the short run it could be better utilised by a community group. When contracts come to an end, it is likely because the Council requires the asset again, meaning we cannot grant the right for tenants to always renew contracts.
- In general, Community Leasing tenants will be responsible for general 'wear and tear' maintenance costs. The level of repair and maintenance will be agreed with Community Leasing tenants at the point of application to reflect

the individual circumstances of the property and the contract agreed. For example, applicants who propose to invest more into a property may be recognised via a larger rent concession.

How is the rent reduction calculated?

The level of rent for a Community Lease will be determined by the Council on a case-by-case basis, reflecting the specific circumstances of the asset and the proposal. As each asset and application presents many distinct factors to be taken into account, it is not possible to prescribe fixed criteria to determine rent levels. In determining the level of rent, the Council will consider factors such as:

- The current condition, market value and demand for the property, including whether it has remained vacant for an extended period.
- The level of investment the applicant proposes to make in the property. For example, if an application committed to investing into the property, it would be more likely to be recognised with a heavily reduced or peppercorn rent.
- The extent to which the proposal supports the Council's strategic objectives, benefits statutory services and delivers social value.

3.3 Long term considerations

Reporting

In order to ensure the assets are being used for their intended purpose, successful applicants will be required to submit their charity commission report, impact report or other agreed document which demonstrates use of the asset to the Council. This report should evidence the social impact and use of the property in line with the use laid out in their initial business plan.

If assets leased under a Community Lease are not being used for the agreed purpose, the Council will reserve the right to recover the asset. If the tenant is found to be breaking the terms of the Community Leasing agreement, then they will be given a period to remedy the situation as set out in their leasing agreement.

Appendix

Appendix 1: Full Application

Community Leasing Full Application

1. The Asset

Name of Asset

Address of Asset

2. Details of the organisation making the application

Name of Organisation

Address of Organisation

Telephone number

Email address

3. Contact Details

Your name

Contact address

Telephone number

Email address

Position in the Organisation

4. Organisation Structure

What kind of organisation are you?
E.g., Registered charity, Community Interest Company etc. See Section 1.4 Eligibility of the Community Leasing Policy for eligible organisation types

Charity / Company number:

5. Governance

When was your organisation established?

Does your organisation have a written constitution, governing document, or set of rules?
If yes, please attach to this document

Yes No

How many people are involved in your organisation in the following positions?

Management committee		Paid full time staff	
Paid part time staff		Volunteers	

Please tell us the type of insurance your organisation holds and provide the levels of cover.
E.g., Public Liability, Employer Liability, Professional Indemnity

6. Terms of Request

What is the length of lease that you are requesting? Please state your reasoning for this requested length of lease. *

**Note that leases will be of a minimum length of three years, with standard leases being seven years.*

Please attach a note setting out any other terms and conditions you wish to apply to the request.

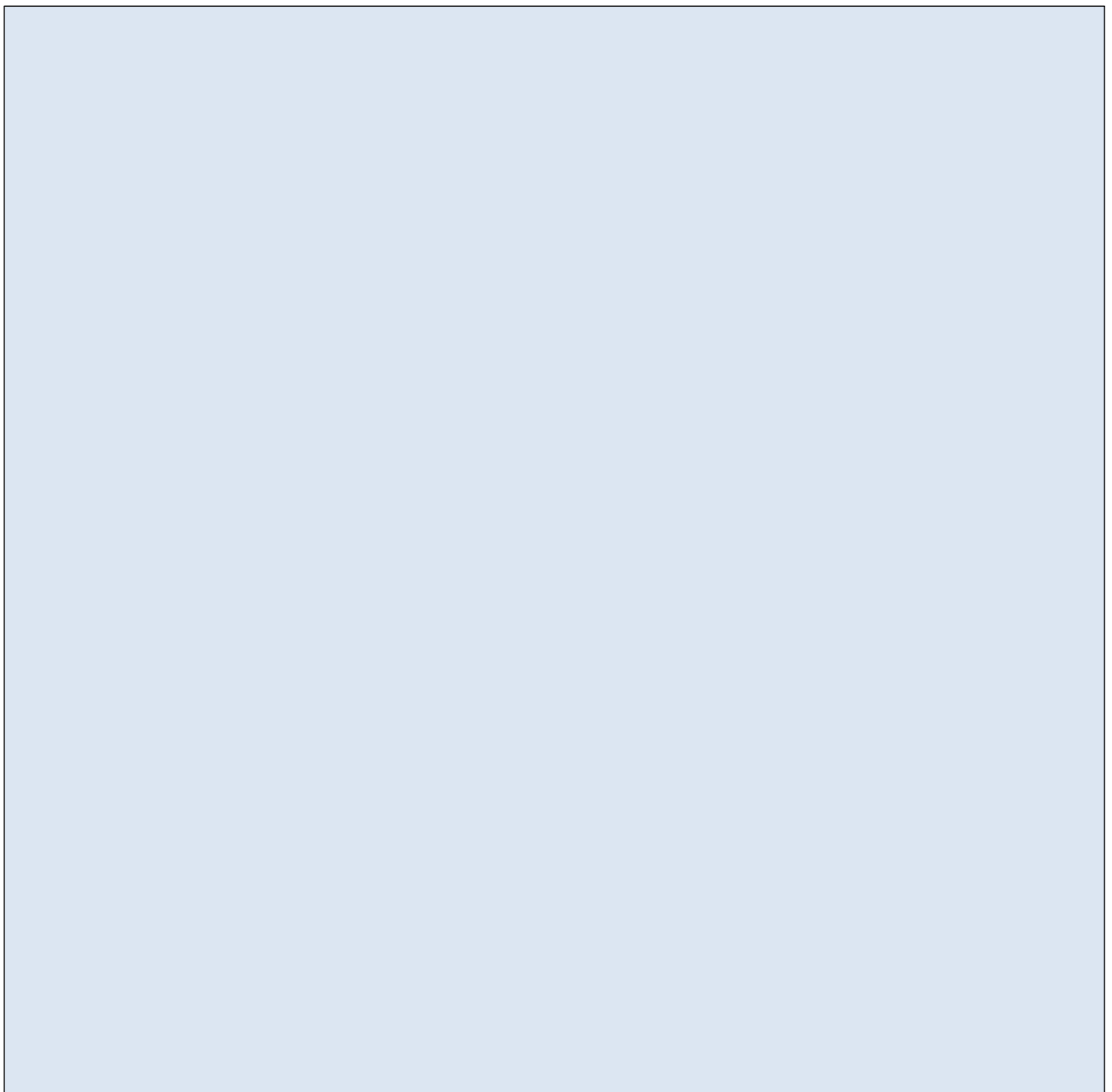
7. Business Plan

For the following section, refer to Section 3.1 to read the Assessment Criteria which will be used to judge your application.

7.1 Use - Set out how you plan to use the asset. Explain the objectives of your project, why there is a need for it, and any activities that will take place there. Please also include your budget for the first year of the lease.

Please note that all applicants will be required to comply with statutory compliance regulations, such as planning permission, building regulations, electrical and fire safety regulations etc.

(500 words max)



7.2 Funding

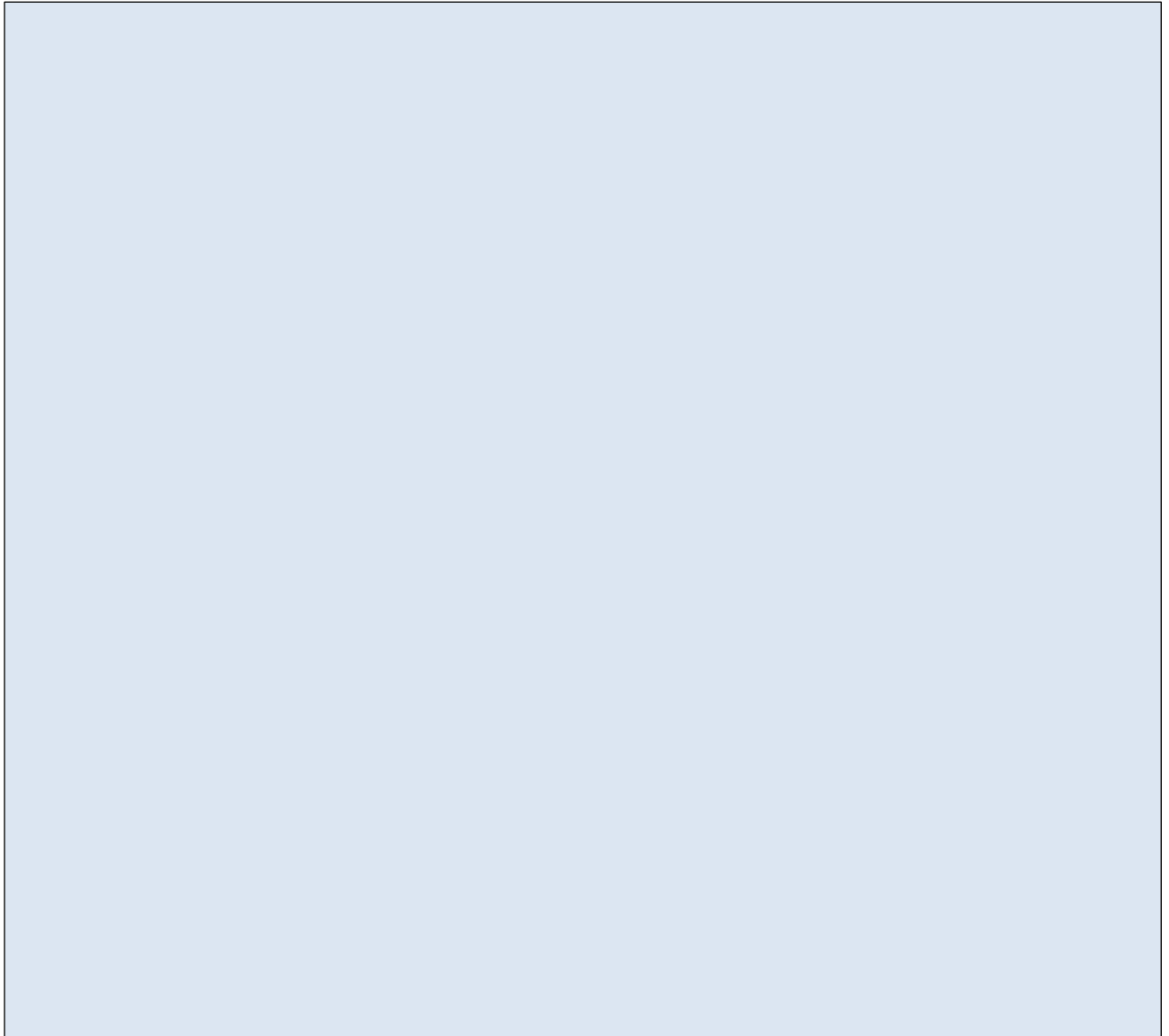
Lay out how you intend to fund your lease payments or repairs and any investment commitment.

Established groups will need to provide accounts that demonstrate three years of good financial management.

For new groups, please provide an outline of how you propose to fund the rent you are prepared to pay for the land, as well as how you are going to hold the property and manage it effectively. You should show your calculations of the costs associated with the transfer of the land or building and your future use of it, including any redevelopment, ongoing maintenance and the costs of your activities. *

**Please note that Council grant funding cannot be used to fund rent or planned investment or repairs.*

(500 words max)



7.3 Investment / Development

Please set out any investment, development or changes you plan to make to the land or building. Business plans that propose to invest into the property will be given further consideration over the terms of the lease, in recognition of the investment into Council assets. (500 words max)



7.4 Social Value – Please set out the social value that will be generated should your application be approved. Consider how your proposal might generate social, economic or environmental benefits for the local community. Consider how your proposal will support either the Council’s Social Value Local Priorities (found in the [Social Value Policy](#)) or [Marmot Place](#) objectives. If applicable, also detail how your proposal would support the Council to deliver any of its statutory services.

Please note that applications do not need to support multiple priorities, and there is no hierarchy of which priorities are preferable.
(500 words max)

A large, empty rectangular box with a light blue background and a thin black border, intended for a student to write their response to the question below.

7.5 Negative consequences – What negative consequences (if any) may occur if your request is agreed to? How would you propose to minimise these? You should consider any potential negative consequences for the local economy, environment, or any group of people, and explain how you could reduce these. (250 words max)

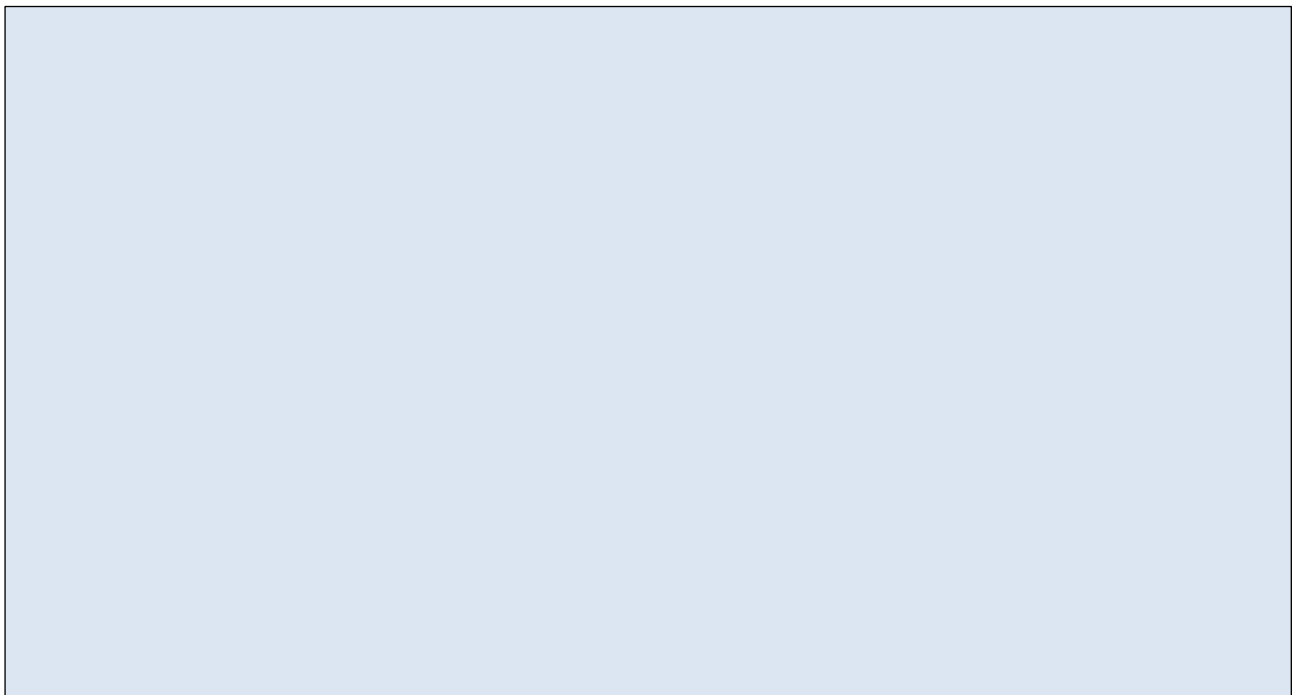
A large, empty rectangular box with a light blue background and a thin black border, intended for a student to write their response to the question above.

7.6 Level and Nature of Support - Please provide details of the level and nature of support for the request, from your community and, if relevant, from others. This could include information on the proportion of your community who are involved with the request, how you have engaged with your community beyond the members of your organisation and what their response has been. (250 words max)



8. Equalities and Inclusion

How will you ensure that your services / activities are inclusive for everyone in your community? (250 words max)



Completed application should be emailed to: Estates.Enquiries@Oxfordshire.gov.uk

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Oxfordshire County Council

Equalities Impact Assessment

COMMUNITY ASSET TRANSFER and COMMUNITY LEASING

24/03/2026

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Section 1: Summary details

Directorate and Service Area	Properties and Assets
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	Community Asset Transfer and Community Leasing policies
Is this a new or existing function or policy?	They are a rework and extension of the current Community Asset Transfer policy.
Summary of assessment Briefly summarise the policy or proposed service change. Summarise possible impacts. Does the proposal bias, discriminate or unfairly disadvantage individuals or groups within the community? (following completion of the assessment).	<p>These policies dictate how we can devolve OCC properties or assets to community groups at less than “best consideration” – that is market rate – in recognition of the social value and public benefit that these groups provide. Community Asset Transfer (CAT) refers to the transferral of ownership of a property whilst Community Leasing refers to the leasing of assets to VCS groups.</p> <p>Whilst these policies do not anticipate negative impacts, outcomes will be dependent on which groups apply for a CAT or Community Lease. Monitoring will therefore be important, and if any challenges or negative impacts are found we will review the EIA.</p>
Completed By	James Cater
Authorised By	Jamie Kavanagh
Date of Assessment	24/03/2026

Section 2: Detail of proposal

<p>Context / Background</p> <p>Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	<p>These policies dictate how we can devolve OCC properties or assets to community groups at less than “best consideration” – that is market rate – in recognition of the social value and public benefit that these groups provide. Community Asset Transfer (CAT) refers to the transferral of ownership of a property, whilst Community Leasing refers to leasing out a property for less than best consideration.</p> <p>This policy is being updated for a few reasons. Firstly, there are currently a selection of VCS groups that are on “rent concessions”, which are largely legacies from concessions made during the COVID pandemic. Updating and expanding these policy means that these groups can apply for a Community Lease. This both means that they have long term security (rather than having to come back and ask for an extension every year, which is time costly both for them and for county council officers), and also means that the system is made uniform and fair, and that other groups (who don’t currently enjoy rent concessions) can also apply for a Community Lease. Making this process uniform and accountable also protects the Council from accusations of unfairness. Secondly, separating them out into CAT and Community Leasing clearly distinguishes between the two and makes the process simpler.</p>
<p>Proposals</p> <p>Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	<p>Firstly, we decided to separate the policies into two: CAT to deal with transferral of ownership, Community Leasing for the leasing of properties. Whilst these policies are very similar, it means we know exactly what we’re talking about.</p> <p>We will establish a Community Asset Transfer and Community Leasing Working Group. This group will have the role of assessing applications, as well as maintaining a list of properties that are available for CAT and Community Leasing. This list will be published online. This means that we are being proactive in looking to do them where we can, but also prudent and only offering them when we know it won’t pose financial risk to the council.</p> <p>The policies will set out when we will do CAT or Community Leasing, the eligibility criteria for organisations who wish to apply, and the criteria by which we will assess them. The assessment criteria used to judge full applications look for how well the proposals support our Social Value Local Priorities (as set out in the 2026 Social Value Policy) and Marmot Place principles / projects, if they propose to invest into the property, their financial sustainability and benefit provided to local residents. A full application form is provided in order to make the application process is standardised, and it has been made as easy to follow as possible.</p>

<p>Evidence / Intelligence</p> <p>List and explain any data, consultation outcomes, research findings, feedback from service users and stakeholders etc, that supports your proposals and can help to inform the judgements you make about potential impact on different individuals, communities or groups and our ability to deliver our climate commitments.</p>	<p>In updating the CAT policy, research was done checking against local and national best practice from where CAT policies have been successfully implemented in other local authorities.</p> <p>These policies were designed with input from throughout the Council. Procurement colleagues assisted with designing the scoring mechanism, and we are tying the Assessment Criteria to their Social Value Local Priorities. Workshops were ran on the policies which had representation from Properties and Assets, Economy and Place, Policy, Legal and Procurement.</p> <p>From 9th February to 9th March, we ran a period of VCS engagement through a Let's Talk Oxfordshire survey. We also ran a webinar on 5th March in which we got feedback in person. The feedback included widening how we were measuring the social value of applications, adding clarity on how rent level is calculated, and expanding how VCS groups could provide yearly reporting, and further explanation was added into the policies accordingly.</p>
<p>Alternatives considered / rejected</p> <p>Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.</p>	<p>Although we currently do have a CAT policy, it is not well known and is extremely rarely used. The alternatives to updating the policies, was doing nothing. Doing nothing would mean continuing the practice by which a handful of VCS tenants have ad hoc rent concessions. This is bad for them, as it means that they cannot properly financial plan for the future, and it is bad for us, as these concessions are difficulty to budget for and are inherently unfair (as there is no process by which they were chosen to not pay rent whilst other VCS tenants do), possibly opening OCC up to risk of accusations of unfairness.</p> <p>Now is also a particularly prudent time to update these policies, as with LGR approaching, there is the possibility that the properties portfolio will greatly increase - in the case of a successful One Oxfordshire bid, for example. Having a policy that is embedded in the council, and has been tested already, means that it will be far easier to replicate it as the opportunities for CAT or Community Leasing increases with the enlarged properties portfolio.</p>

Section 3: Impact Assessment - Protected Characteristics

Protected Characteristic	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Age	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated.	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Disability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Gender Reassignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Marriage & Civil Partnership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.

Pregnancy & Maternity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Race	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Sex	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Sexual Orientation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.
Religion or Belief	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated	The Full Application is a standardised form which has clear guidance for each section in order to make it as accessible as possible.	Nominated Property and Assets officer on the CAT / Community Leasing Working group.	A full review will take place after one year, and sooner if any significant challenge arises.

Section 3: Impact Assessment - Additional Community Impacts

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Rural communities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			
Armed Forces	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			
Carers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			
Areas of deprivation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			

Section 3: Impact Assessment - Additional Wider Impacts

Additional Wider Impacts	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			
Other Council Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			
Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No anticipated negative impacts are associated with this policy decision. Contingent on the organisation, only positive impacts are anticipated			
Social Value ¹	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Successful applicants for a CAT or Community Lease are required to show how their proposed use for the property provides a public			

¹ If the Public Services (Social Value) Act 2012 applies to this proposal, please summarise here how you have considered how the contract might improve the economic, social, and environmental well-being of the relevant area

Additional Wider Impacts	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
				benefit and relates to our Social Value Local Priorities.			

Section 4: Review

Where bias, negative impact or disadvantage is identified, the proposal and/or implementation can be adapted or changed; meaning there is a need for regular review. This review may also be needed to reflect additional data and evidence for a fuller assessment (proportionate to the decision in question). Please state the agreed review timescale for the identified impacts of the policy implementation or service change.

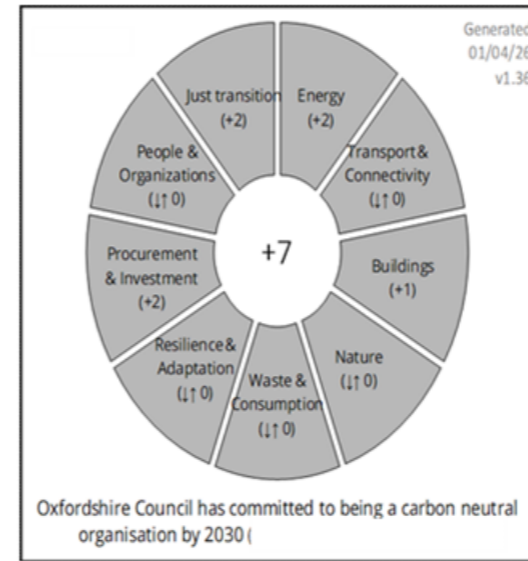
Review Date	21/03/2027 (Full review after one year, and sooner if any significant challenge arises – as to be decided by the CAT / Community Leasing Working Group).
Person Responsible for Review	The nominated Property and Assets officer on the CAT / Community Leasing Working Group.
Authorised By	

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Climate Impact Assessment

Summary

Directorate and Service Area	Properties and Assets
What is being assessed	Community Asset Transfer and Community Leasing policies
Is this a new or existing function or policy?	They are a rework and extension of the current Community Asset Transfer policy.
Summary of assessment	<p>These policies have the objective of providing community assets for providing public benefit by either transferring ownership or leasing "at least than best consideration", that is less than their full market value. OCC has established in its Climate Action Framework that all properties in which it operates should achieve carbon neutrality by 2030, in addition all properties that are leased by the council should achieve net zero as soon as possible in the 2040's, since the county has decided to be ahead of the national 2050 net zero target. Transferring ownership of properties to community groups also transfers the responsibility for decarbonising these properties to community groups. Community groups are known to be financially constrained but will have access to sources of decarbonisation funds that the council does not have access. Whilst the policies establish that properties that require capital investment are not eligible for CAT and Community Leasing, the council may still provide revenue funded support for decarbonisation provided resources and funds are available (subject also to LGR) after prioritising the council own's operational property and leased property decarbonisation. There is one untapped opportunity that the proposed policies should explore further: linking the community asset transfer programme to the councils's community energy strategies, so community properties can also benefit from renewable energy generation.</p>
Completed by	James Cater, National Management Trainee, revised and amended by Franco Gonzalez, Carbon Analyst
Climate action sign off by	Franco Gonzalez, Carbon Analyst
Director sign off by	
Assessment date	31/03/2026



Detail of proposal

<p>Context / Background</p>	<p>These policies dictate how we can devolve OCC properties or assets to community groups at less than “best consideration” – that is market rate – in recognition of the social value and public benefit that these groups provide. Community Asset Transfer (CAT) refers to the transferral of ownership of a property, whilst Community Leasing refers to leasing out a property for less than best consideration.</p> <p>This policy is being updated for a few reasons. Firstly, there are currently a selection of VCS groups that are on “rent concessions”, which are largely legacies from concessions made during the COVID pandemic. Updating and expanding these policy means that these groups can apply for a Community Lease. This both means that they have long term security (rather than having to come back and ask for an extension every year, which is time costly both for them and for county council officers), and also means that the system is made uniform and fair, and that other groups (who don’t currently enjoy rent concessions) can also apply for a Community Lease. Making this process uniform and accountable also protects the Council from accusations of unfairness. Secondly, separating them out into CAT and Community Leasing clearly distinguishes between the two and makes the process simpler.</p>
<p>Proposal</p>	<p>Firstly, we decided to separate the policies into two: CAT to deal with transferral of ownership, Community Leasing for the leasing of properties. Whilst these policies are very similar, it means we know exactly what we’re talking about.</p> <p>We will establish a Community Asset Transfer and Community Leasing Working Group. This group will have the role of assessing applications, as well as maintaining a list of properties that are available for CAT and Community Leasing. This list will be published online. This means that we are being proactive in looking to do them where we can, but also prudent and only offering them when we know it won’t pose financial risk to the council.</p> <p>The policies will set out when we will do CAT or Community Leasing, the eligibility criteria for organisations who wish to apply, and the criteria by which we will assess them. The assessment criteria used to judge full applications look for how well the proposals support our Social Value Local Priorities (as set out in the 2026 Social Value Policy) and Marmot Place principles / projects, if they propose to invest into the property, their financial sustainability and benefit provided to local residents.</p>
<p>Evidence / Intelligence</p>	<p>In updating the CAT policy, research was done checking against local and national best practice from where CAT policies have been successfully implemented in other local authorities. These policies were designed with input from throughout the Council. Procurement colleagues assisted with designing the scoring mechanism, and we are tying the Assessment Criteria to their Social Value Local Priorities. Workshops were ran on the policies which had representation from Properties and Assets, Economy and Place, Policy, Legal and Procurement. From 9th February to 9th March, we ran a period of VCS engagement through a Let’s Talk Oxfordshire survey. We also ran a webinar on 5th March in which we got feedback in person. None of the feedback on these policies related to environmental concerns. The feedback included widening how we were measuring the social value of applications, adding clarity on how rent level is calculated, and expanding how VCS groups could provide yearly reporting.</p>
<p>Alternatives considered / rejected</p>	<p>Although we currently do have a CAT policy, it is not well known and is extremely rarely used. The alternatives to updating the policies, was doing nothing. Doing nothing would mean continuing the practice by which a handful of VCS tenants have ad hoc rent concessions. This is bad for them, as it means that they cannot properly financial plan for the future, and it is bad for us, as these concessions are difficulty to budget for and are inherently unfair (as there is no process by which they were chosen to not pay rent whilst other VCS tenants do), possibly opening OCC up to risk of accusations of unfairness. Now is also a particularly prudent time to update these policies, as with LGR approaching, there is the possibility that the properties portfolio will greatly increase - in the case of a successful One Oxfordshire bid, for example. Having a policy that is embedded in the council, and has been tested already, means that it will be far easier to replicate it as the opportunities for CAT or Community Leasing increases with the enlarged properties portfolio.</p>

Category	Impact criteria	Score (-3 to +3)	Description of impact	Actions or mitigations to reduce negative impacts	Action owner	Timeline and monitoring arrangements
Energy	Increases energy efficiency		In the case of Community Leases, central government regulations require that Non-Domestic Privately Rented Properties (including those rented by local authorities) comply with Minimum Energy Efficiency Standard Regulations such as achieving an EPC of C by 2027 and an EPC of B between 2030-25 (specific year to be confirmed by central government in 2026). The Council is aware of these regulations.	N/A		
Energy	Promotes a switch to low-carbon or renewable energy		There is an opportunity for promoting renewable energy generation in assets transferred to community groups (akin to Community Energy schemes). The Council can provide guidance and link community groups to community energy leaders in Oxfordshire (e.g. Low Carbon Hub). This opportunity is not explored in this proposal.	Explore missed opportunities for linking CAT policy with the council's community energy strategies.		
Energy	Promotes resilient, local, smart energy systems	N/A		N/A		
Transport & Connectivity	Reduces need to travel and/or the need for private car ownership	N/A		N/A		
Transport & Connectivity	Supports active travel	N/A		N/A		
Transport & Connectivity	Increases use of public transport	N/A		N/A		
Transport & Connectivity	Accelerates electrification of transport	N/A		N/A		
Buildings	Promotes net zero new builds and developments	N/A	Policies will not lead to any new building development.	N/A		
Buildings	Accelerates retrofitting of existing buildings		Subject to resource and funds availability (and subject to any changes resulting from Local Government Reorganisation), OCC may work with community groups to invest, maintain and repair including retrofitting in properties that are devolved through CAT or Community Leasing. Many community groups are anticipated to have limited resources however also have access to different funding streams closed to the authority, the Council can work with the community groups concerning the properties transferred or leased to ensure best outcomes for the community.	N/A		
Nature	Protects, restores or enhances biodiversity, landscape and ecosystems	N/A		N/A		
Nature	Develops blue and green infrastructure	N/A		N/A		
Nature	Improves access to nature and green spaces	N/A		N/A		
Waste & Consumption	Reduces overall consumption	N/A		N/A		
Waste & Consumption	Supports waste prevention and drive reuse and recycling	N/A		N/A		
Resilience & Adaptation	Increases resilience to flooding	N/A		N/A		
Resilience & Adaptation	Increases resilience to other extreme weather events (e.g., storms, cold snaps, heatwaves, droughts)	N/A		N/A		
Resilience & Adaptation	Increases resilience of council services, communities, energy systems, transport infrastructure and/or supply chains	N/A		N/A		
Procurement & Investment	Procurement practices prioritise low-carbon options, circular economy and	N/A		N/A		

Procurement & Investment	Investment being considered supports climate action/ is consistent with path to net zero		Both leased assets (part of council's Scope 3 emissions) and properties whose ownership has been transferred to community groups need to achieve net zero as soon as possible in the 2040's following OCC's Climate Action Framework. Within this target, following the GHG protocol, the council has direct responsibility to decarbonise leased assets whereas in the case of transferred properties the responsibility will fall to community groups who acquire ownership of properties. Nevertheless, as stated above, subject to resource and funds availability (and subject to any changes resulting from Local Government Reorganisation), OCC may work with community groups to invest, maintain and repair including retrofitting in properties that are devolved through CAT or Community Leasing.	N/A
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People & Organizations	Drives behavioural change to address the climate and ecological emergency	N/A		N/A
People & Organizations	Drives organizational and systemic change to address the climate and ecological emergency	N/A		N/A
Just transition	Promotes green innovation and job creation	N/A		N/A
Just transition	Promotes health and wellbeing	N/A		N/A

Just transition	Reduces poverty and inequality		Community asset transfer has the potential to address inequality, measures have been taken for local government assets sold under lower than market price are not resold to private for profit organisations and therefore lost to the community sector (section 3.2 Long Term Considerations).	N/A
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PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

17 APRIL 2026

BUSINESS MANAGEMENT AND MONITORING REPORT & CAPITAL OUTTURN REPORT (FOCUS ON ADULT SERVICES)

Report by the Deputy Chief Executive (S151 Officer)

RECOMMENDATION

1. The Committee is **RECOMMENDED** to
 - consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet.

Executive Summary

2. The Performance and Corporate Services Overview and Scrutiny Committee has a constitutional responsibility to scrutinise 'corporate performance and directorate performance and financial reporting.'
3. The Cabinet is informed of the Council's performance via the Business Management and Monitoring Report (BMMR). To aid the ability to scrutinise, the Committee agreed to focus on Adult Services in April 2026.
4. To reflect the Cabinet March 2026 BMMR paper that reported the January financial position and end of Q3 performance and strategic risk, there is an abridged version as Annex 1 (Performance) and Annex 2 (Finance).

Background

5. The paper reports on the Council's performance in terms of finance, delivery and risk, including detail at a service level. To support a focus on Adult's Services, there are only excerpts relating to the service included here. In that respect, the report is the same as that considered by Cabinet on 17 March 2026.

Performance

6. Committee members should be aware that they are being provided with the scorecard of the Council's performance in relating to annual measures and specific measures directly relating to Adult Services in Annex 2.
7. There are 7 KPIs, 2 off track, 5 on Track

Financial Position

8. There is a forecast overspend of £7.5m in 2025/26 against a budget of £259.9m.
9. Increased demand within the Home First/Discharge to Assess service has created a £1.8m pressure; mitigations have been put in place to reduce this in the remaining two months of the year. In 2026/27 the on-going impact will be managed through the Better Care Fund.
10. The number of packages of care for service users under 65 has increased during 2025/26 and this is currently forecast to create a pressure of £3.5m - the on-going effect will need to be managed in 2026/27 as this is not built into the budget agreed in February 2026.
11. Pressures within the transport and external day service areas are the main reason for a forecast pressure of £1.7m within learning disabilities. The forecast also includes a £0.5m on-going pressure linked to the cost of equipment and the re-procurement of the equipment contract – the on-going impact of the new contract was considered through the 2026/27 budget process.

Adult Social Care Debtors

12. The collection rate, based on invoice volumes up to 31 January 2026, met the target of 94%. Debt requiring impairment is forecast to be £4.15m, £0.4m below the 2024/25 year-end balance of £4.5m.

Capital Programme

13. Updates on the Capital Programme are provided in the Capital Monitoring and Outturn Reports to Cabinet. The excerpts are from 17 March Cabinet
14. Capital expenditure included in the programme that relates to Adult Services is:

Residential Accommodation Programme

15. This programme will deliver much-needed, bespoke, and high-quality specialist supported housing in Oxfordshire for adults who may currently be in hospital or secure units. It marks a vital step forward in improving quality of life and long-term outcomes by enabling people to live more independently within their communities. The initiative is designed to ensure accommodation is provided in a way that is both financially sustainable and socially impactful. In the absence of private sector investment in these essential services, council-led intervention is crucial. Without it, individuals would remain in inappropriate or high-cost settings that do not support autonomy or integration.
16. Forecast expenditure for 2025/26 is £2.1m. This will be funded from the £5.9m funding for residential accommodation approved in February 2025.

Resonance Supported Homes Fund

17. During 2024/25 a further £2.0m was paid to the Resonance Supported Homes Fund bringing the total investment to £5.0m. A total of 5 properties have been purchased, developed and are now fully mobilised and operational. This investment resulted in a total of 22 new beds for people with a learning disability in Oxfordshire.

Disabled Facilities Grant

18. Disabled Facilities Grant of £8.8m has been passed to the District Councils in 2025/26 in accordance with the Better Care Fund grant determination. Households are eligible to apply for the grant for home adaptations if a child or adult in the household has a substantial and permanent disability. Types of adaptations funded by the grant include stairlifts, level access showers, ground floor extensions designed around a person's needs and kitchens designed for a wheelchair user.

Corporate Policies and Priorities

19. Overall corporate performance supports all the Council's policies and strategic priorities. Whilst the work of Adult Services has cross-cutting input into all the Council's strategic priorities also, its work primarily furthers the Council's ambitions to "Tackle inequalities in Oxfordshire", "Prioritise the health and wellbeing of residents", and "support carers and the social care system".

Strategic Risks

20. There are no strategic risks that relate directly to Adult Services. Risks that the service impact on are SR01 Financial Resilience and SR09 Delivering the Future Together.

Financial Implications

21. There are no additional financial implications beyond those outlined within the appendices to this report.

Comments checked by:

Kathy Wilcox, Head of Corporate Finance
kathy.wilcox@oxfordshire.gov.uk

Legal Implications

22. The Performance and Corporate Services Overview and Scrutiny Committee has a specific responsibility within its terms of reference, under Part 6.1A of the Constitution 5 (1) (a) to scrutinise 'corporate performance and directorate performance and financial reporting'.

23. There are no additional legal implications beyond those outlined within the appendices to this report.

Comments checked by:

Lorna Baxter
Deputy Chief Executive (S151 Officer)

Annex: Annex 1: Abridged Business Management and Monitoring Report – Annex A Performance section – March 2026

Annex 2: Abridged Business Management and Monitoring Report – Annex D Finance section – March 2026

Background papers: None

Other Documents: None

Contact Officer: Verity Royle
Financial Planning and Reporting Manager
verity.royle@oxfordshire.gov.uk

April 2026

**Annex 1 – Abridged Business Management and Monitoring Report – Annex A
Performance – March 2026**

	Target	Q3	Status	
OCC04.01 % of people who received short term services during 25/26 with no further support request.	79.4%	77.08%	RED	Whilst the overall % to independence remains static for the last rolling 12 months, there are improvements that have been seen in the last 3 months following training of strategic providers, increased staffing levels and refinement of the discharge pathway available. Going forward our aim is to reflect these positive improvements in a way that is clear to all. Training continues to be delivered to zonal providers of reablement, prompt recording of outcomes is being actively worked on with the Home First multi-disciplinary team and recruitment to new posts.
OCC04.02 % of residents 18-64 with Learning Disability support who live on their own or with family (Monitoring only)	0%	91.61%	GREEN	
OCC04.03 % Section 42 safeguarding enquiries where identified risk was reduced or removed	93%	95%	GREEN	Oxfordshire County Council continue to work to reduce where risk is identified in safeguarding. The team continue to prioritise this ensuring that the risk to residents is reduced or removed where possible.

	Target	Q3	Status	
OCC04.05 Number of carers assessments completed (Monitoring only)	0	446	GREEN	
OCC04.06 % of young people referred who have an ASC assessment in place by their 18 th birthday	90%	96%	GREEN	
OCC04.07 The number of people supported into employment (Monitoring only)	0	12	GREEN	

Annex 2 Abridged Business Management and Monitoring Report – Annex D Finance – March 2026

Service Area forecast

Service	Cabinet Member	Director	Net Budget	Forecast	Forecast Variance	Last Reported (period 8)	Change
Adult Social Care	T Beard	K Fuller	£37.4m	£37.4m	£0.0m	£0.0m	£0.0m
Pooled Budgets (Adults Social Care and NHS)	T Beard	K Fuller	£222.5m	£230.0m	£7.5m	£4.5m	-£3.0m
Adult Services			£259.9m	£267.4m	£7.5m	£4.5m	-£3.0m

Confirmed Government Grants

Ringfenced	Issued By	Service Areas	Budget Book 2025/26
R	DHSC	Improved Better Care Fund	£13.7m
R	DHSC	Adult Social Care Market Sustainability and Improvement Fund	£10.0m
			£23.2m

No changes in grants since Budget Book

Savings

Savings	Target	Red - No Plan	Amber - Some Issues	Green - On track	Blue - Achieved	Variance Under / (-) Over
	£'000	£'000	£'000	£'000	£'000	£'000
Adult Services	6,474	0	468	613	5,962	-570

Highlight only the over and underachievements

Ref	Description	2025/26 £000	Amber - Some Issues £000	Green - On Track £000	Blue - Achieved £000	Variance Under / (-) Over £000
2025ASC682	Reviews of care packages for service users with mental health needs linked to health funding.	-900			-235	-665
2026ASC21	The charge for setting up of an universal deferred payment agreement have been reviewed for the first time since 2015 and updated to cover the setting up costs of these agreements, as set out in Care Act 2014.	-150	-60		-79	-11
2026ASC24	Arrangement fees for people who fund their own care have been reviewed and brought in line with other local authorities.	-20	0		-17	-3

Ref	Description	2025/26 £000	Amber - Some Issues £000	Green - On Track £000	Blue - Achieved £000	Variance Under / (-) Over £000
24AD12	High Cost placement reviews (packages over £2500 per week)	-175			-1,026	851
24AD4	Savings achieved through case reviews/management	-385		-280	-471	366
24AD7	Shared Lives - increase the number of people who can find a home through the shared lives scheme. Build further on the success of the service to provide options for respite for a wider range of individuals.	-74	-20		-110	56
2026RLGEST10	Several projects are being transitioned into the New Ways of Working with an amalgamation activities/ contracts, with a review of both Children's and Adults Transport services.	-25	0			-25
		-6474	-468	-613	-5962	570

Reserves

Reserves	Balance at 31 March 2025	Movement	Balance at 31 March 2026	Notes
Adults Social Care Grants	£0.5m	-£0.4m	£0.1m	
Grants and Contributions reserve	£0.5m	-£0.4m	£0.1m	
Trailblazer Initiative	£0.1m	-£0.1m	£0.0m	
Government Initiatives reserve	£0.1m	-£0.1m	£0.0m	
Trading & Vehicle & Equipment Reserve	£0.1m	£0.0m	£0.1m	
Budget Priorities				
Oxfordshire Way	£0.5m	£0.0m	£0.5m	
Social Care	£4.5m	-£4.5m	£0.0m	
OCCG Contributions	£0.3m	-£0.3m	£0.1m	
Other priorities (investment carry forwards, DWP Grant)	£0.8m	-£0.8m	£0.0m	
Government Initiatives reserve	£6.0m	-£5.4m	£0.6m	
Subtotal	£6.6m	-£5.9m	£0.7m	
Public Health & Homes for Ukraine	£14.4m	-£6.3m	£8.1m	

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

Councillor Glynis Phillips, Chair | Tom Hudson, Principal Scrutiny Officer, tom.hudson@oxfordshire.gov.uk

The action and recommendation tracker enables the Committee to monitor progress against agreed actions and recommendations. The tracker is updated with the actions and recommendations agreed at each meeting. Once an action or recommendation has been completed or fully implemented, it will be shaded green and reported into the next meeting of the Committee, after which it will be removed from the tracker.

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting Date	Item	Recommendation	Lead	Update/response
155 12-Sept-25	BMMR – CEF Focus	That in its forthcoming Youth Strategy the Cabinet should ensure a more equitable distribution of voluntary sector youth services, particularly making sure that funding is allocated based on need rather than simply supporting existing services.	Lisa Lyons	Partially Accepted See agenda item 11
05-Dec-25	BMMR – Public Health Focus	1. That the Council clarifies its plan as to how it will lead on developing with system partners a shared understanding of and common approach to addressing local health inequality priorities.	Ansaf Azhar	Accepted See agenda item 11
		2. That the Council devises a relevant metric or metrics to enable it to understand vaping prevalence in the county, to allow it to take informed steps to reduce its harms.		Accepted See agenda item 11

Agenda Item 9

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
Page 156		3. That the Council undertakes a review of the successes and areas for improvement of the Homes for Ukraine scheme to inform the types of support necessary to maximise the chances of arriving families integrating and thriving under Community Sponsorship.		Accepted See agenda item 11
16-Jan-26	Budget Proposals for 2026/27 to 2030/31	1. That greater detail of the contribution non-Public Health areas make to the Council's Marmot agenda is provided within the Council's budget report, particularly in relation to mitigating the negative health impacts of climate change	Lorna Baxter	Accepted See agenda item 11
		2. That 2 hour parking in Oxford City in Zone 2 is included within the list of fees and charges in the Council's budget report.		Accepted See agenda item 11
		3. That Council is provided with the options appraisal used when assessing to progress with the Watlington Relief Road as part of the budget report.		Partially Accepted See agenda item 11
		4. That plans for Public Realm Improvement expenditure are brought to members at Localities meetings.		Partially Accepted See agenda item 11

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
Page 157		5. That the Council writes to the Valuation Office Agency to raise the issue of 2000 homes without council tax bands.		Rejected See agenda item 11
		6. That the Council collates and reviews direct feedback from children, where available, from schools, concerning the quality of current school meals.		Accepted See agenda item 11
05-Dec-25	Parking Permits	1. That the Council recognises the urgent need for improvements in the online parking permit system and extends the current contract by only one year.	Paul Fermer	Accepted See agenda item 11
		2. That as part of the early scoping process for the procurement, the Council involves members in reviewing the current system to identify, understand and design-out current flaws.		Accepted See agenda item 11
		3. That the Council prioritises quality and functionality over price in its weighting for the procurement of the new online parking permit system and/or reviews the measures it uses to adjudge quality to make them more reflective of end user experience.		Accepted See agenda item 11

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
Page 158		4. That the Council reviews its CPZ and parking strategy urgently, to allow it to inform the Council's technological requirements.		Accepted See agenda item 11
		5. That the Cabinet investigates the viability of enabling trained 'super-users' to check the permit status of a particular car and report it to the Council without violating GDPR.		Partially Accepted See agenda item 11
		6. That the Council, if it does not already do so, adopts a policy of writing to non-visitor permit users who do not have e mails to warn them when their permits are shortly to expire.		Accepted See agenda item 11
		7. That the Council works to raise awareness amongst GPs about their role in supporting unregistered carers access parking permits.		Accepted See agenda item 11
16-Jan-26	Draft Social Value Policy	1. That any policy on supporting social value through procurement should form part of a wider policy on generating social value and supporting community wealth building across all the Council's functions, and that the Cabinet should commit to a holistic approach.	Ian Dyson	Accepted See agenda item 11

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
Page 159		2. That in developing and implementing its new social value policy, the Cabinet should draw on the experience of best-practice councils including Durham, Manchester and Preston, as well as the 2023 commissioned report from the Centre for Local Economic Strategies.		Accepted See agenda item 11
		3. That That the Cabinet considers, when developing a new set of Themes, Outcomes, and Measures (TOMs) for application in Oxfordshire, how these reflect its commitments to putting climate change at the heart of everything it does as well as safeguarding the wellbeing of future generations.		Rejected See agenda item 11
		4. That the Cabinet considers how its new social value policy can support delivery of the Council's Local Nature Recovery Strategy.		Accepted See agenda item 11
		5. That the Cabinet should set targets and make available to organisations proven, impactful projects which focus on the key priorities the Council would like to address in relation to social value.		Partially Accepted See agenda item 11
		6. That the Cabinet specifically considers the opportunities to support social value through the disposal of land and		Rejected

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
Page 160		property and ensure policy is developed around this, especially around Community Asset Transfer.		See agenda item 11
		7. That the Cabinet should work alongside fellow anchor institutions in the public (and private sector) to align their procurement policies to maximise social value generation and their collective impact on the wider Oxfordshire economy through their purchasing power.		Accepted See agenda item 11
		8. That the Cabinet should work with anchor institutions in the public (and private sector) to adopt a shared understanding of social value and work together to direct contributions to support schemes which have a long-lasting impact on Oxfordshire residents and their communities.		Accepted See agenda item 11
		9. That the Cabinet considers having a light-touch set of social value requirements for smaller contracts.		Rejected See agenda item 11
		10. That the Cabinet reconsiders the proposed social value weighting which is currently set at the statutory minimum of 10%.		Rejected See agenda item 11

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
		11. That the Cabinet should ensure that its choice of social value measures incentivises inclusive forms of ownership, including co-operatives and social enterprises.		Partially Accepted See agenda item 11
Page 161	Fix My Street	1. That the Council extends "find and fix" powers, including considering a trial similar to Devon County Council's recent trial's approach.	Paul Ferner	Sent to Cabinet 27-Jan-26
05-Dec-25		2. That the Council considers marking additional defects with spray paint to show residents that issues have been noted, even if not immediately fixed.		
		3. That the Council increases the percentage of road defect repairs that are quality assured from the current 20% level.		
		4. That the Council uses Fix My Street to update residents, especially regarding the status of interim repairs and expected timescales for permanent fixes, and keeps notifications active until permanent repairs are completed.		
		5. That the Council considers requiring photos for appropriate categories of reports – those where it is		

**Recommendation Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

KEY	Due to Cabinet	Presented to Cabinet	Complete
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Meeting date	Item	Recommendation	Lead	Update/response
Page 162		safe and practical - to improve the quality of initial submissions.		
		6. That the Council improves communication with the public about the criteria for pavement repairs, as residents often do not understand why some pavements are not fixed.		
		7. That the Council provides expectations of super-users, and implements more post-training support.		
		8. That the Council develops a target for the percentage of defects originating from Fix My Street to increase the current 25% figure, which is considered too low.		

Action Tracker
Performance & Corporate Services Overview & Scrutiny Committee

Councillor Glynis Phillips, Chair | Tom Hudson, Principal Scrutiny Officer, tom.hudson@oxfordshire.gov.uk

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KEY	Delayed	In progress	Complete
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Page 163

Meeting date	Item	Action	Lead	Update/response
There are no outstanding action items.				

**Recommendation Update Tracker
Performance & Corporate Services Overview & Scrutiny Committee**

Councillor Glynis Phillips, Chair | Tom Hudson, Principal Scrutiny Officer, tom.hudson@oxfordshire.gov.uk

The recommendation update tracker enables the Committee to monitor progress accepted recommendations. The tracker is updated with recommendations accepted by Cabinet. Once a recommendation has been updated, it will be shaded green and reported into the next meeting of the Committee, after which it will be removed from the tracker. If the recommendation will be update in the form of a separate item, it will be shaded yellow.

KEY	Update Pending	Update in Item	Updated
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Cabinet Response Date	Item	Lead	Update
25-Feb-25	Commercial Strategy Update	Ian Dyson	See agenda item 11
25-Feb-25	Community Asset Transfer Policy	Vic Kurzeja; Michael Smedley	Update Pending
18-Nov-25	Hire Bike & Scooter	Paul Fermer	Update Pending
18-Nov-25	Our People and Culture Strategy	Cherie Cuthbertson	Update Pending
21-Oct-25	Oxfordshire Strategic Plan	Susannah Wintersgill	Update Pending
09-Dec-26	Devolution	Kim Sawyer	Update Pending

Work Programme
Performance and Corporate Services Overview and Scrutiny Committee

Councillor Glynis Phillips, Chair | Tom Hudson, Scrutiny Manager
tom.hudson@oxfordshire.gov.uk

Topic	Relevant strategic priorities	Purpose	Type	Lead Presenters
17 April 2026				
Business Management Monitoring Report, with a focus on Adult Social Care	Fairer, Healthier	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at Adult Social Care	Scrutiny	Cllr Bearder; Karen Fuller, Kathy Wilcox
Community Asset Transfer Policy	All	To review the draft Community Asset Transfer Policy prior to it being considered at Cabinet	Overview	Cllr Levy, Vic Kurzeja, James Cater
Customer Service Centre Update	Underpins all	To receive an overview of the performance of the Customer Service Centre	Scrutiny	Cllr Fawcett, Susannah Wintersgill, Tom Parsons
Devolution	All	To receive an update on the latest devolution developments	Overview	Kim Sawyer

12 June 2026

Business Management Monitoring Report, with a focus on the Fire Service	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at the Fire Service.	Scrutiny	Cllr Leffman; Cllr Fawcett; Cllr Levy; Rob MacDougall
Commercial Strategy Progress Update	Underpins all	To review the progress of the Council's Commercial Strategy	Scrutiny	Cllr Higgins; Cllr Levy; Lorna Baxter; Ian Dyson
Economic Strategy	Underpins all	To review the draft Economic Strategy prior to it being considered at Cabinet	Overview	Cllr Higgins; Robin Rogers, Nick Glover
Devolution Update	Underpins all	To consider the report scheduled to go to Cabinet in relation to Devolution	Overview	Cllr Leffman; Kim Sawyer

18 September 2026

Wider Social Value	All	To review the Council's progress on drawing together its strands of work around Social Value into a single, coherent policy	Overview	Cllr Levy; Ian Dyson, Richard Scarlett, Max Button
Business Management Monitoring Report, with a focus on the Resources	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at Resources.	Scrutiny	Cllr Leffman; Cllr Fawcett; Cllr Levy; Directors to be invited at a later point as there is the potential for many to have to attend.



AI benefits	Underpins all	To review the Council's use of AI: its cost, its usage, the mitigations against dangers, the monitoring of value. An in-depth look at the use of AI within the customer service centre is requested.	Overview	Cllr Fawcett; Lorna Baxter; Other leads to be confirmed
04 December 2026				
Marmot Integration	Fairer, Healthier	To review the Council's progress in implementing a system-wide approach towards achieving the Council's Marmot principles concerning health inequalities	Overview	Cabinet member TBC, Ansaf Azhar, Karen Fuller, Lisa Lyons
Business Management Monitoring Report, with a focus on Children, Education and Families	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at the Children, Education and Families service	Scrutiny	Cllr Leffman; Cllr Gaul; Cllr Levy; Lisa Lyons
15 January 2027				
Budget	All	To review the proposed budget prior to its consideration by Cabinet and, ultimately, Council.	Scrutiny	All Cabinet members and directors invited
16 April 2027				
Business Management Monitoring Report, with a focus on Economy and Place, and	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource	Scrutiny	Cllr Leffman; Cllr Gant; Cllr Rogers; Cllr Higgins; Cllr Levy; Robin



Environment and Highways		use. The review will take a focused look at the Economy and Place, and Environment and Highways services		Rogers; Paul Fermer
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Sub-groups				
Name	Relevant strategic priorities	Description	Outcomes	Members
There are currently no sub-groups				

Briefings/Other					
Date	Topic	Relevant strategic priorities	Description	Outcomes	Presenters
There are no scheduled member briefings					

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Overview & Scrutiny Recommendation Response Pro forma

Under section 9FE of the Local Government Act 2000, Overview and Scrutiny Committees must require the Cabinet or local authority to respond to a report or recommendations made thereto by an Overview and Scrutiny Committee. Such a response must be provided within two months from the date on which it is requested¹ and, if the report or recommendations in questions were published, the response also must be so.

This template provides a structure which respondents are encouraged to use. However, respondents are welcome to depart from the suggested structure provided the same information is included in a response. The usual way to publish a response is to include it in the agenda of a meeting of the body to which the report or recommendations were addressed.

Issue: **BMMR (with a focus on Children, Education and Families)**

Lead Cabinet Member(s): **Cllr Sean Gaul, Cabinet Member for Children and Young People**

Date response requested:² **18 November 2025**

Response to report:

Enter text here.

¹ Date of the meeting at which report/recommendations were received

² Date of the meeting at which report/recommendations were received

Overview & Scrutiny Recommendation Response Pro forma

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
<p>1. That in its forthcoming Youth Strategy the Cabinet should ensure a more equitable distribution of voluntary sector youth services, particularly making sure that funding is allocated based on need rather than simply supporting existing services.</p>	<p>Partially accepted</p>	<p>The forthcoming youth strategy will ensure equitable access and distribution of voluntary sector or other youth opportunities. In line with our duty, we will continue to work with partners across sectors to map available provision for children and secure, as far as reasonably practicable, sufficient provision.</p> <p>The National Youth Agency has published its new youth strategy in December 2025 with strong ambitions to grow and build back youth services and we currently await further detail on this. We are committed to continuing our work with partners across sectors to build capacity and youth offers across the county.</p>

Overview & Scrutiny Recommendation Response Pro forma

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Issue: BMMR (with a focus on Public Health)

Lead Cabinet Member(s): Cllr Kate Gregory, Cabinet Member for Public Health & Inequalities

Date response requested:² 27 January 2026

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
1. That the Council clarifies its plan as to how it will lead on developing with system partners a shared understanding of and common approach to addressing local health inequality priorities.	Accepted	The council's commitment to the Marmot approach is being overseen by the HWB, to ensure this is aligned and embedded with other key system agendas. Systemwide partners are working together at a senior level through an advisory board, to agree key areas of focus. The Institute of Health Equity review

¹ Date of the meeting at which report/recommendations were received

² Date of the meeting at which report/recommendations were received

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		<p>of inequalities, initially focusing on CYP, is driving shared commitment to addressing the identified inequalities, and ensuring this is informed by the experience of residents.</p> <p>In addition, the council are driving a “social movement” approach, promoting, training, and mapping examples of work on health equity. This includes an ambition to build health equity into strategies and services at the start.</p>
<p>2. That the Council devises a relevant metric or metrics to enable it to understand vaping prevalence in the county, to allow it to take informed steps to reduce its harms.</p>	<p>Accepted</p>	<p>That the Council devises a relevant metric to enable it to understand vaping prevalence amongst young people in the county, to allow it to take informed steps to reduce its use amongst young people (acknowledging that smoking is more harmful than vaping and regulated vapes are a NICE recommended method for smokers to quit BUT vaping is not recommended for non smokers)</p>
<p>3. That the Council undertakes a review of the successes and areas for improvement of the Homes for Ukraine scheme to inform the types of support necessary to maximise the chances of arriving families integrating and thriving under Community Sponsorship</p>	<p>Accepted</p>	<p>That the Council undertakes a review of the successes and areas for improvement of the Homes for Ukraine scheme to inform the types of support necessary to maximise the chances of arriving families integrating and thriving under Community Sponsorship (Accepted)</p> <p>The Homes for Ukraine (HfU) scheme enables UK hosts to accommodate Ukrainians in their own homes. Each arrival comes with an integration tariff of £5,900 per person that is paid to local authorities to undertake welfare, DBS and property checks, as well as provide a range of support to help them access services and integrate into the community over an initial 3-year period. This scheme is fundamentally different from the Community Sponsorship (CS) scheme which enables voluntary and community groups to sponsor refugees. There is no</p>

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	<p>funding for the local authority as the sponsor group provides the support function, including the provision of suitable accommodation and having to raise £9,000 to support the individual or family over a 2-year period. Local authorities are involved in the checking process to ensure sponsor groups have the appropriate safeguarding and safety processes in place. There have been very few families sponsored under CS nationally, with only 1 family in Oxfordshire – whereas there have been over 3,000 Ukrainians coming to stay in the county.</p> <p>The HfU scheme has highlighted the importance of local authorities being involved in the safeguarding, welfare and property checks, and the need for effective partnership working between central and local government, and between local authorities and the VCS. While CS offers a sustainable model of integration, it requires significant upfront planning, fundraising, and long-term commitment from community groups, as well as system level support from local authorities and other partners for longer-term stability.</p>
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Overview & Scrutiny Recommendation Response Pro forma

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
<p>1. That greater detail of the contribution non-Public Health areas make to the Council’s Marmot agenda is provided within the Council’s budget report, particularly in relation to mitigating the negative health impacts of climate change</p>	<p>Accepted</p>	<p>Paragraphs 123 and 124 have been added to the report to Cabinet on 27 January 2026.</p> <p>123. Public health grant needs to be spent within the terms and conditions of ring fence. Approximately 80% of the public health budget is spent on mandated statutory services, most of which are preventative in nature and will contribute towards reducing demand across system, particularly in the short term, across the health and care system.</p> <p>124. However, the real value and leadership is in embedding public health approach across the system and the council. To realise the ambition of becoming Marmot place, all directorates are investing on prevention and public health approach to improve health and wellbeing outcomes, reduce inequalities and reduce health care demand. These examples include investment into early years, family hub, active transport infrastructure, food strategy, community capacity grant, mental wellbeing provision and creating libraries and other front facing settings into community hubs. Working in partnership with ICB public health has also secured significant fund for community development activities such the well together provision and physical activity programmes. All these initiatives have benefits across multiple domains from improving health and wellbeing, positive climate interventions, cost of living and managing demands across public sector. As</p>

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		well as delivering against the public health grant, the public health team will work with wider directorates and the wider system to build a total place offer to enhance the public health delivery across the system.
2. That 2 hour parking in Oxford City in Zone 2 is included within the list of fees and charges in the Council's budget report.	Accepted	<p>The additional charge has been added to Annex A and the proposed budget. It is also noted in paragraph 160 of the Cabinet report.</p> <ul style="list-style-type: none"> A new 2 hour charge for Zone 2 in Oxford (including Jericho) will be implemented in 2026/27 in line with 2026L&CO23 agreed as part of the budget in February 2025. The cost will be double the 1 hour parking
3. That Council is provided with the options appraisal used when assessing to progress with the Watlington Relief Road as part of the budget report.	Partially Accepted	<p>The options appraisal and need was considered and evidenced as part of the Local Plan process and will also form part of the planning application process and consideration (specifically within the Transport Assessment).</p> <p>Relevant documents can be accessed here:</p> <ul style="list-style-type: none"> Local Plan 2035 Documents and Evidence Base Planning Register Oxfordshire County Council <p>At each project stage and report into Cabinet (or Cabinet member as appropriate), the schemes value for money and benefit will continue to be considered as part of necessary council approvals.</p>
4. That plans for Public Realm Improvement expenditure are brought to members at Localities meetings.	Partially Accepted	The budget is limited and will be focussed on key and well used pedestrian movement corridors. Proposals to be included within these maintenance improvements will be

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		discussed with the Local County Councillor/s and if appropriate brought to relevant Locality Meetings.
5. That the Council writes to the Valuation Office Agency to raise the issue of 2000 homes without council tax bands	Rejected	Council Tax is the responsibility of the District Councils therefore it will be for them to write to the VOA.
6. That the Council collates and reviews direct feedback from children, where available, from schools, concerning the quality of current school meals	Accepted	The council regularly surveys both parents and students to ensure thorough engagement. The next survey is planned for the summer term in 2026 and will cover topics such as the children's preferences as well as the quality and variety of the school meals.

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Issue: **Parking Permits**

Lead Cabinet Member(s): **Cllr Andrew Gant, Cabinet Member for Transport Management**

Date response requested:² **27 January 2026**

Response to report:

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¹ Date of the meeting at which report/recommendations were received

² Date of the meeting at which report/recommendations were received

Overview & Scrutiny Recommendation Response Pro forma

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
<p>1. That the Council recognises the urgent need for improvements in the online parking permit system, and extends the current contract by only one year</p>	<p>Accept</p>	<p>Initial extension has only been agreed for 1 year. There is still the option / ability to extend for a 2nd year if required but it is not the intention to do so.</p>
<p>2. That as part of the early scoping process for the procurement, the Council involves members in reviewing the current system to identify, understand and design-out current flaws</p>	<p>Accept</p>	<p>An appropriate level of stakeholder engagement and independent user tested will be built into the procurement and subsequent system testing process.</p>
<p>3. That the Council prioritises quality and functionality over price in its weighting for the procurement of the new online parking permit system and/or reviews the measures it uses to adjudge quality to make them more reflective of end user experience.</p>	<p>Accept</p>	<p>As per the county council's standard approach currently, contract assessment will be based on 60% quality, 10% social value and 30% price. User experience is a key part of the quality element with assessed user demonstrations.</p>
<p>4. That the Council reviews its CPZ and parking strategy urgently, to allow it to inform the Council's technological requirements</p>	<p>Accept</p>	<p>The enforcement service is engaging with transport policy teams with a view to update countywide parking policy & strategies, including CPZ. Ahead of that, Civil Enforcement Operational Policy is currently being reviewed and will be consulted on. To confirm future contracts will be flexible enough to respond to changes in parking policies and maximise the use of the latest technology to manage and enforce.</p>

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<p>5. That the Cabinet investigates the viability of enabling trained ‘super-users’ to check the permit status of a particular car and report it to the Council without violating GDPR</p>	<p>Partially accept</p>	<p>The viability of ‘super users’ has been investigated from a number of angles, including employment law and user safety.</p> <p>From a data protection perspective, any information processed by a superuser must not indicate offence or give personal information, as this is enforcement data which requires prescribed lawful basis and statutory function for processing. As such providing the status of a particular car is not appropriate.</p> <p>However, there maybe options such as reviewing the status of say 10 cars or providing a direct feed to the council. As it is considered there are benefits to this, the feasibility of this will continue to be investigated.</p>
<p>6. That the Council, if it does not already do so, adopts a policy of writing to non-visitor permit users who do not have e mails to warn them when their permits are shortly to expire.</p>	<p>Accepted</p>	<p>Reviews of existing processes are being undertaken with the plan to improve communication - including implement writing to residents ahead of the permit expiry date for users who are not able to be contacted electronically. The intention is to identify an automated solution to the creation of letters.</p>
<p>7. That the Council works to raise awareness amongst GPs about their role in supporting unregistered carers access parking permits</p>	<p>Accepted</p>	<p>Officers have and will continue to engage with GP’s to support this process through the traffic filters/ congestion charge trial and the need to support permit applications. This was met with limited success. We will continue to work with comms team within the council as how to improve engagement with GP’s.</p>

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Issue: **Draft Social Value Policy**

Lead Cabinet Member(s): **Cllr Levy, Cabinet Member for Finance, Property and Transformation**

Date response requested:² **24 February 2026**

Response to report: Report of Performance and Corporate Services Overview & Scrutiny Committee
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¹ Date of the meeting at which report/recommendations were received

² Date of the meeting at which report/recommendations were received

Overview & Scrutiny Recommendation Response Pro forma

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
<p>1. That any policy on supporting social value through procurement should form part of a wider policy on generating social value and supporting community wealth building across all the Council's functions, and that the Cabinet should commit to a holistic approach.</p>	<p>Accept</p>	<p>The policy sets the Council's procurement and commissioning mechanism for delivering wider benefits through contracts, aligned to local priorities and wider corporate commitments. While procurement is one lever among many, the approach supports consistent practice through themed questions, delivery planning, contract management and annual reporting. This provides a foundation that can complement wider place-based and community wealth ambitions across the Council's functions. A nominated officer (HO Commercial and Procurement) will be placed to lead the linking up of social value across the organisation and with external stakeholders. One action being taken forward is a social value prospectus from the councils service areas. Actions will also be taken to ensure policies such as Community Asset Transfer feature the same themes to give a cohesive approach which can be easily understood by internal and external stakeholders.</p>
<p>2. That in developing and implementing its new social value policy, the Cabinet should draw on the experience of best-practice councils including Durham, Manchester and Preston, as well as the 2023 commissioned report from the Centre for Local Economic Strategies.</p>	<p>Accept</p>	<p>The Council has drawn on external learning in developing the in-house approach and will continue to benchmark and improve over time. This includes that of Durham, Camden and Preston. The policy includes a commitment to periodic review so it remains current with changing legislation, market conditions and local priorities. The revised approach is intentionally streamlined to reduce administrative burden and improve uptake, while maintaining clear expectations and accountability for delivery. Actions on this are to include: Continue horizon scanning and</p>

Overview & Scrutiny Recommendation Response Pro forma

		benchmarking; incorporate learning through periodic review and refreshed guidance.
3. That That the Cabinet considers, when developing a new set of Themes, Outcomes, and Measures (TOMs) for application in Oxfordshire, how these reflect its commitments to putting climate change at the heart of everything it does as well as safeguarding the wellbeing of future generations.	Reject	The Council is not proposing to develop a bespoke TOMs framework. Instead, the in-house approach uses five local priority themes and contract-specific questions, with SMART measures that remain clearly related to the subject matter of each contract and proportionate in application. This provides flexibility to embed climate considerations where relevant, while retaining a practical approach for suppliers and contract managers.
4. That the Cabinet considers how its new social value policy can support delivery of the Council's Local Nature Recovery Strategy.	Accept	The Council can support local nature recovery through the environmental and place-based outcomes that can be sought under the 'Local Area Regeneration' theme, where relevant to the contract. The themes enable service areas to frame questions that reflect local priorities and ensure deliverability through market engagement. This is complemented by the Council's ethical and sustainable procurement requirements, which strengthen expectations on environmental performance across the supply chain. Suppliers will be directed to the LNRS mapping tools and other resources to maintain a localised approach to any delivery.
5. That the Cabinet should set targets and make available to organisations proven, impactful projects which focus on the key priorities the Council would like to address in relation to social value	Partially Accept	The policy establishes five priority themes to provide a consistent framework linking to the strategic priorities of the council, whilst allowing service areas to drill down into more specific, contract-relevant asks through the procurement process. For each qualifying procurement, service areas select two themes to maintain focus. Questions are then developed to suit the contract and the market, supported by pre-market engagement to ensure the ask is deliverable. Suppliers are required to submit a Social Value Delivery Plan with SMART measures, milestones and estimated costs, enabling delivery to be monitored through

Overview & Scrutiny Recommendation Response Pro forma

		contract management and reported transparently. This will be reflected in an annual social value report.
6. That the Cabinet specifically considers the opportunities to support social value through the disposal of land and property and ensure policy is developed around this, especially around Community Asset Transfer.	Reject	The Council recognises the importance of land and property decisions in delivering community benefit. However, the Social Value Policy is designed specifically for procurement and commissioning activity. Opportunities relating to land, property and Community Asset Transfer are best addressed through the appropriate property governance routes, including a new CAT policy which is under development. This policy development has worked closely to mirror the priorities outlined in the social value policy to maintain consistency. Next steps are to ensure links between approaches are reflected through appropriate property governance and policy development routes.
7. That the Cabinet should work alongside fellow anchor institutions in the public (and private sector) to align their procurement policies to maximise social value generation and their collective impact on the wider Oxfordshire economy through their purchasing power.	Accept	The Council supports working with partners and anchor institutions to maximise the collective impact of local spend and delivery. The in-house approach provides a clear, locally aligned framework that can be shared and discussed with partners, whilst ensuring award criteria remain lawful, contract-relevant and proportionate. The Council will continue to progress this through existing partnership routes and will be working pre and post LGR with relevant anchor institutions in shaping the wider social value approach of Oxfordshire.
8. That the Cabinet should work with anchor institutions in the public (and private sector) to adopt a shared understanding of social value and work together to direct contributions to support schemes which have a long-lasting impact on Oxfordshire residents and their communities.	Accept	The themed approach provides a shared structure for social value, while allowing service areas to tailor specific asks to local need and market capability through pre-market engagement. Delivery is secured through Social Value Delivery Plans and monitored through contract management. Where non-delivery persists after remediation, the approach allows for service credits that are ring-fenced and reinvested against the Council's social value themes, supporting targeted and transparent use of funds. The next steps for building out our relations with anchor institutions include developing clear comms for partners on themes, delivery planning

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		and reporting; explore options for shared understanding through OIEP and other anchor institutes around Oxfordshire and working on our social value prospectus for exempt contracts from the main social value workflow.
9. That the Cabinet considers having a light-touch set of social value requirements for smaller contracts	Reject	The new approach is already designed to be proportionate. Social value tender weighting applies by default only for procurements above £100,000, with defined exemptions where applying the standard approach would not be appropriate (for example, short-duration contracts and certain VCSE markets). For lower value contracts, officers can still secure appropriate outcomes through contract design and ethical requirements without introducing unnecessary process or cost for smaller suppliers. Ongoing actions will be to embed proportionality and exemptions through guidance and templates and support service areas to apply the approach consistently.
10. That the Cabinet reconsiders the proposed social value weighting which is currently set at the statutory minimum of 10%.	Reject	The proposed weighting of 10% is intended as a proportionate baseline that supports consistent application and reduces barriers to participation, particularly for smaller suppliers, while maintaining appropriate balance with price and quality. This approach was chosen to allow more focus on quality and cost, whilst maintaining excellent social value. Some of the sustainability elements have now been embedded into contract specifications through the ethical procurement policy, allowing for a lower weighting of social value. This will be monitored for supplier uptake and contract management success.
11. That the Cabinet should ensure that its choice of social value measures incentivises inclusive forms of ownership, including co-operatives and social enterprises.	Partial Acceptance	The Council recognises the contribution of social enterprises, co-operatives and SMEs, and the policy supports proportionate application and avoids undue barriers for such organisations. While the Social Value Policy necessarily provides a consistent structure to support improved delivery of social value, the Council's wider social value action plan incorporates ambitions to further

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		reduce barriers to entry for VCSEs and SMEs, and to seek routes to ring-fencing specific opportunities for those types of organisations that inherently support the Council's social value ambitions. This is therefore out of the scope for further action under this policy.
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