Notice of a Meeting

OXFORDSHIRE COUNTY COUNCIL

Performance & Corporate Services Overview & Scrutiny Committee
Friday, 19 July 2024 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 online, please click on this Live Stream Link.
However, that will not allow you to participate in the meeting.

Membership

Chair - TBC
Deputy Chair - TBC

Councillors:		
Brad Baines	Kieron Mallon	Glynis Phillips
Arash Fatemian	Ian Middleton	
Damian Haywood	Calum Miller	
Bob Johnston	Eddie Reeves	

Notes: **Date of next meeting:** *13 September 2024*

For more information about this Committee please contact:
Committee Officer   -   *Scrutiny Team*
E-Mail: scrutiny@oxfordshire.gov.uk

Martin Reeves
Chief Executive

July 2024

What does this Committee review or scrutinise?

All corporate services and budget scrutiny, including customer services, property, assets, procurement, finance, corporate policy matters such as consultation and public engagement; takes a lead role in scrutiny of the budget and corporate plan.

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 days before the date of the meeting.**

About the County Council

The Oxfordshire County Council is made up of 63 councillors who are democratically elected every four years. The Council provides a range of services to Oxfordshire's 678,000 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 £0.9 billion of public money in providing these services. Most decisions are taken by a Cabinet of 9 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.   Election of Chair for the 2024/25 Council Year

2.   Election of Deputy Chair for the 2024/25 Council Year

3.   Apologies for Absence and Temporary Appointments

To receive any apologies for absence and temporary appointments.

4.   Declaration of Interests

See guidance note on the back page.

5.   Petitions and Public Address

Members of the public who wish to speak at this meeting can attend the meeting in person or 'virtually' through an online connection.

To facilitate 'hybrid' meetings we are asking that requests to speak or present a petition are submitted by no later than 9am four working days before the meeting i.e., 9am on 15 July 2024. Requests to speak should be sent 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 your views are taken into account. A written copy of your statement can be provided no later than 9am 2 working days before the meeting. Written submissions should be no longer than 1 A4 sheet.

6.   Minutes (Pages 1 - 10)

The Committee is recommended to **APPROVE** the minutes of the meeting held on 19 April 2024 and to receive information arising from them.

7.   Community Wealth Building and Wider Social Value (Pages 11 - 64)

Cllr Dr Nathan Ley, Cabinet Member for Public Health, Inequalities and Community Safety, Robin Rogers, Programme Director (Partnerships and Delivery), and Emily Urquhart, Policy Officer, have invited to present a report on the Council's approach to Community Wealth Building and Wider Social Value outside the statutory processes relating to procurement.

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

8.   LEP Integration (Pages 65 - 70)

Cllr Liz Leffman, Leader of the Council, Chloe Taylor, Head of Economy, and Nigel Tipple, LEP Chief Executive, have been invited to present a report on Local Enterprise Partnership (LEP) Integration.

recycled paper

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

NB The report for this item is attached. However, a slide deck will also be used during the meeting, which will be issued as a supplement.

9.   **Committee Forward Work Plan** (Pages 71 - 200)

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. (NB Members are provided with the annual report, the same document as provided to Cabinet in June, rather than a quarterly breakdown).

10.   **Responses to Previous Recommendations**

No responses have been made by Cabinet since the previous meeting.

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.

OXFORDSHIRE PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

MINUTES of the meeting held on Friday, 19 April 2024 commencing at 10.00 am and finishing at 11.45 am

Present:

Voting Members:	Councillor Eddie Reeves - in the Chair
	Councillor Brad Baines
	Councillor Donna Ford
	Councillor Bob Johnston
	Councillor Kieron Mallon
	Councillor Calum Miller
	Councillor Glynis Phillips
Other Members in Attendance:	Councillor Liz Leffman, Leader of the Council
	Councillor Dan Levy, Cabinet Member for Finance
Officers:	Lorna Baxter, Executive Director (Resources)
	Stephen Chandler, Executive Director (People) (online)
	Ian Dyson, Director of Finance Services
	Mark Haynes, Director of Customer and Culture, including Transformation (interim) (online)
	Melissa Sage, Head of Procurement Contract Management (online)
	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.

10/24 DECLARATION OF INTERESTS - SEE GUIDANCE NOTE ON THE BACK PAGE
(Agenda Item 1)

There were none.

11/24 APOLOGIES FOR ABSENCE AND TEMPORARY APPOINTMENTS
(Agenda Item 2)

Apologies were received from Cllr Haywood and from Cllr Middleton.

At the Chair's discretion, Cllr Haywood was allowed to attend the meeting virtually as a guest, but he did not participate in any formulation of recommendations or voting.

12/24 PETITIONS AND PUBLIC ADDRESS
(Agenda Item 3)

There were none.

13/24 MINUTES
(Agenda Item 4)

The minutes of the meeting held on 19th January 2024 were **AGREED** as an accurate record, subject to the following amendments:

*   The addition on the fifth page of reference to the NHS not currently being supportive of the workplace parking levy.

14/24 COMMERCIAL STRATEGY
(Agenda Item 5)

Councillor Dan Levy, Cabinet Member for Finance, Lorna Baxter, Executive Director (Resources), and Ian Dyson, Director of Finance Services were invited to present the Commercial Strategy report submitted to and agreed by Cabinet on 19 March 2024.

The Cabinet Minister for Finance introduced the report and argued that while the Commercial strategy was in its early stages, Oxfordshire County Council (OCC) should not pass up sensible opportunities to be more commercial, at a time when many councils across the country faced financial difficulties. The Cabinet member of Finance emphasised that being more commercial would underpin the Council's prime function of supporting residents, businesses, and visitors. Challenges were expected but it was seen as important to get into a commercial mindset.

The Director of Finance Services wanted to ensure the 'business as usual' activity was tight and strong by focusing, for the upcoming year, on upskilling staff, processes, and contracts to ensure they were done right. This was to maximise the organisation's assets, driving productivity and value for money, and allowing more ambitious commercial thinking and projects. An example of the work that had already been done was the digitisation of the business case process where good management practises were being developed. Other good opportunities to think commercially had already been taken, such as with the international market being engaged over the sale of County Hall.

The Committee raised a number of issues and questions about the strategy:

*   Where had the figure of 3-10% of total expenditure through typical efficiencies of a more commercially minded organisation come from?

    PwC and Arcadis had both been used to consult on the strategy, in relation to assessing the Council's commercial maturity. Both companies had independently suggested that figures were expected to be in this

range having benchmarked the progress of other organisations who had gone through a similar process.

- In relation to the risk appetite, how did Officers expect to manage risk if they did not know the risks? Could Officers define the risk appetite?

  It was seen as suitable to define the risk appetite on a case-by-case basis. The risk would be looked at along with the feasibility of each opportunity as it was presented and balanced against the potential benefits of the opportunity. Each project would have its own risk management.

- How was the new commercial mindset to be embedded throughout the organisation? Additionally, what funding had been made available for this in relation to consultants and staff training?

  Arcadis had reported on the commercial maturity of the organisation. This report was designed to help provide a road map of how the commercial strategy would be implemented and embedded across the organisation. There was to be a focus on training and upskilling existing staff, in addition to changes to governance which aligned to the wider transformation process. Individualised training would improve value attained and would link with the transformation piece to ensure coherent training across the organisation. It was seen that all officers should have a level of commercial thinking about everything they do to ensure they were thinking about getting the best value for money possible. Improving the productivity of the organisation was seen as the main objective of the process.

  Concerning funding, there had been an initial investment of £100k to look at the Council's commercial maturity and to provide the road map. An appraisal of the report from Arcadis would follow to determine what the next steps were and if further investment was required. It was emphasised that as much work would be done internally as possible, reducing the level of investment required on external consultants.

- The Committee suggested that the use of the term 'commercial' was misleading and unhelpful. The stated remit of the strategy indicated that it would extend beyond direct commercial relationships. The word 'commercial' suggested a narrow bottom-line focused approach, while the strategy suggested a broader set of values the Council hoped to change through this culture change. There were also concerns that the term 'commercial' suggested that the strategy was concerned about attempts to get more money out of Oxfordshire residents.

  The term 'commercial' had been used following research into the areas it was hoped the strategy would improve. The research consistently came back to commercial thinking, which was why the term was used as the strategy title. Notwithstanding this, officers did acknowledge the points made concerning the connotations of the term.

Officers emphasised the Commercial strategy was not about making money from residents. The strategy was about changing the way the organisation thought about itself and changing its mindset. The strategy would change the way the organisation thought about its relationships with residents and other partners and how it generated funds to support residents and do what the Council needed to do.

Officers acknowledged that the term 'commercial' could be looked at to make the objectives of the strategy immediately clearer.

- Whether there was an intended hierarchy is the Startagy's commercial priorities. Also, whether there was a juxtaposition between community focus and a commercial strategy with one focused on the community and the other or maximum revenue.

  There was no designed hierarchy for the commercial priorities, with all stated priorities intended to be delivered with the same level of importance. The strategy was about finding the right balance in what the organisation wanted to achieve. The priorities would help the Council achieve the best value for money allowing for services to be as efficient and productive as possible for residents. This did not mean making the services profitable.

- Members suggested that it would have been helpful to distil the categories of actions suggested in the commercial strategy. It was felt that these different categories of actions would require different levels of scrutiny. Activities seen as driving maximum returns from assets or generating revenue would require greater scrutiny and governance. In relation to this it was questioned whether the Commercial Board – wholly staffed by officers - was the best arrangement and whether other forms of governance were considered.

  Following the report from Arcadis, officers would start to form a full action plan which would include different sections/categories of activities the organisation could consider. Natural political governance would then take place, and real thinking would be given as to what the board would look like and deliver.

  Various options for governance were to be investigated. With the Local Enterprise Partnership (LEP) now under Council responsibility, Officers were considering how it wanted the company to be run, which included appropriate governance arrangements. The outcome of LEP governance determinations would help determine how governance would look for other commercial opportunities.

- It was stressed, by Members, that the result of this strategy had to be a better service for the residents of Oxfordshire. While the intent to become more commercial was praised, it should not distract the Council from performing its day job to supply the services needed across the County.

The Committee was assured that the intention of the Commercial Strategy was to generate efficiencies and additional money. These outcomes would allow the Council to do what it must do to support residents, and what is wanted to do to in creating better services for residents. The strategy was to allow the organisation to do things better by being focused, efficient, and, where appropriate, commercial.

- The Committee expressed a desire for the Commercial Strategy to be consulted on with the district and city councils, owing to their responsibilities for economic regeneration. Similarly, the core responsibilities of the LEP had to be weaved through the Commercial Strategy. It was hoped the CEO of the LEP would look at the strategy to see how the inherited work would inform the Strategy.

  The Leader of the Council agreed with Committee that District Councils needed to be included is these strategic discussions. Assurances were also made that District Councils would continue to be represented on the LEP Board and Future Oxfordshire Partnership.

- There was also interest in seeing a line concerning the prospect of joint procurement, as was exampled by the Fire and Rescue joint procurement practices with Buckinghamshire and Berkshire.

  The Committee was informed of the development of a separate procurement strategy, which would supplement the Commercial Strategy. This included the work done by the Oxfordshire Inclusive Economic Partnership (OIEP). Work had been undertaken to investigate any common procurement opportunities. A significant benefit of the work was the sharing of best practices across services and Districts. Appropriate procurements had been carried out jointly with Districts.

- What did the administration mean by an inclusive economy, did this include reducing inequalities and was it being ambitious enough in this area? What were the social value outcomes intended from this strategy which went beyond the bottom line or commercial revenue maximisation? How was the Commercial Strategy linked to the social value and community wealth building strategy which had been agreed as part of the most recent budget?

  The Leader pointed to examples of community benefit companies who work for the community and turn a small profit which is reinvest that in the community. This was the sort of mindset the Commercial Strategy hoped to achieve.

  Pockets of deprivation within the county were being addressed, and the Strategy was to ensure that all people were included in the county's economy, reaching out to those who had previously been excluded. The strategy was about delivering services in a way that would benefit the community while taking advantage of commercial opportunities. Although

they did not feature in the Commercial Strategy, community hubs were highlighted, by the Leader, as a means to include more people, who has previously been excluded, in the economy. The objective of the OIEP was to involve local businesses, helping the organisation find local suppliers and connecting local businesses with the communities around them.

The Leader emphasised that the strategy was not a finished piece work. It was a statement on the direction of travel the Council wanted to go in. The Strategy would stop a simple reliance on government funding but also generate its own funding to benefit the residents the Council serves. There would be projects that the Council would want feedback from the Committee on.

- The Committee questioned what data and KPI's would be used throughout the Commercial Strategy.

The maturity assessment which had been carried out included an analysis of the quality of data the organisation held and what types of data should be looked at. It was seen as important that the data informed commercial decision, especially around suppliers and contracts. However, the data maturity at this stage was not strong but would develop alongside the Transformation of the Organisation, which related to the following agenda item for Committee.

15/24 APPROACH TO TRANSFORMATION
(Agenda Item 6)

The Committee had requested an item on the Council's approach to Transformation. Councillor Liz Leffman, Leader of the Council, Stephen Chandler, Executive Director (People), and Mark Haynes, Director of Customer and Culture, including Transformation (interim) presented a report on Transformation to the Committee.

The Leader introduced the report describing how it cut across the whole organisation and supported the Delivering the Future Together programme. Staff had been worked with closely with regular well-attended meetings fostering much positive feedback.

The purpose of the Transformation programme was to support the nine priorities of the Administration as well as the organisation's vision to be the employer, partner, and place shaper of choice. The programme would also help the organisation become more sustainable, one aspect of which had already been discussed in the previous item. Partnerships and collaborations were also an important part of the programme to deliver all the services the Council wanted while embracing technology.

The Executive Director (People) and Director of Customer and Culture, including Transformation (interim), presented the programme to the Committee. Transformation was about large-scale strategic changes that

would help the organisation operate differently, focusing on culture, technology, and business models within the organisation.

The Transformation programme encompassed five keys areas which would help the organisation reach its overall objective to become a sustainable and successful organisation. These included being leaner, fewer buildings, embracing technology, collaborating with partners, and leveraging commercial opportunities.

The agreed governance process was explained through the workings and stages of the Strategic Transformation Programme Board (STPB), also known as the Design Authority. The transformation route was also explained throughout the five stages of: identify, define, design, deliver, and close. An update was given of where various transformation projects were in this transformation route, including the Commercial Strategy.

An update was also provided on the Delivery Hub Concept. This included the Programme Management Office, which included the Change Academy; Business Intelligence, including data and insights; and Communities of Practice, where like-minded people came together to share knowledge and learn new skills.

The Committee addressed the following issues:

- Whether the governance structures were too bureaucratic and time consuming, in terms of the number of meetings. It was also unclear to the Committee, how one meeting, within the governance structure, would affect or impact subsequent meetings. Clear lines of accountability and governance transparency were recognised as essential.

  Officers acknowledged that it was always about finding a balance between robust governance without creating its own industry of works. Technologies were being looked at to ensure systems and processes were as automated and lean as possible, including the use of AI. Sufficient rigour and governance would remain essential. The system was constantly being evaluated, including by the Lean Team. This was to make sure teams and projects were not stepping on each other's toes, and program managers were talking to one another with clear roles and responsibilities.

- How much were consultants being used in transformation program, and would transformation process leave the organisation more or less reliant on consultants in the future to carry out core functions of the organisation?

  The Change Academy existed to ensure OCC staff were properly trained to avoid the organisation needing or relying on consultants, such as PwC. The support PwC provided in developing the Transformation programme finished on 2nd April 2024. The programme had since been operating without external support, though there remained consultant involvement

on a small, time limited piece of work concerning automation. However, this did not close the door on the organisation taking advantage of either the expertise or capacity a consultant could offer for a short-term piece of work.

Officers highlighted their commitment to ensuring the skills and abilities in the organisation are developed and growing our own. The creation of a Director of Transformation and Customer Service was intended to guarantee the capability and capacity within the organisation grows and matures without the reliance on external consultants.

The Change Academy graduates were employees who had put themselves forward and wanted to make this difference to within the organisation. This demonstrated a commitment to the ethos of becoming an employer of choice where people could invest in their careers at OCC. This formed a crucial part of the iterative process of transformation which would reduce the Council's reliance on consultants by ensuring people were trained to continue the process and develop their career.

It was also explained that the term 'consultancy' had been used interchangeably. The £4m commitment to savings in this area was largely focused on agency staff savings.

- Members also requested an update on whether the delayering process within the organisation was on track.

  Officers were aware of potential for pushback against terms such as transformation and its feared connotations of restructuring or job losses. However, officers attempted to alleviate these fears and highlighted the organisation's attempts to reframe the concept of transformation as becoming the employer of choice and being supportive of what OCC staff wanted to do.

  The process of delayering had begun with the first tranche focusing at the Director level. Consultation was hoped to be finished within the week and feedback received allowing the process to move on to more junior levels within the Organisation.

  Meetings had also been held on a regular basis with staff to guarantee complete transparency over the whole process. Unions had also been involved in discussions, and they understood the intentions of the delayering process.

- Could OCC be the employer of choice if roles were constantly changing making it difficult to settle into a role? Could the restructure encourage experienced members of staff to leave? What guarantees could be given to stakeholders that the Transformation process would create a more resilient organisation in the long term, rather than simply achieve medium term financial targets?

Officers did not agree that the Transformation programme and approach would make it harder to attract or retain staff. It was argued that the workforce was aware employment is more fluid than it had ever previously been. An organisation that allowed employees to grow and develop was seen as a positive. Being the employer of choice was about allowing this growth and development, by providing staff with opportunities to experience new things within employment. Transformation would create and offer these different opportunities. The Change Academy was highlighted as an example of creating these opportunities.

There had been a tendency in the past not to look to develop from within the Organisation. Instead, the Organisation would look externally. This was seen as something the Organisation had to learn to do and maximise the potential for staff to move across as well as up and down the Organisation.

The Committee resolved to request the following actions:

- For a Gantt chart, relating to a Transformation project, to be shared with Members of the Committee as an example of the processes carried out.

16/24   BUDGET MONITORING AND REPORTING UPDATE
(Agenda Item 7)

Lorna Baxter, Executive Director (Resources) provided a brief verbal update on changes made to the Business Management and Monitoring Report (BMMR), specifically in relation to budget monitoring.

Investments and savings from the budget passed in February would be monitored through the BMMR. This went through to Cabinet on a bimonthly basis and would also come through this Committee to be debated.

The importance of tracking all changes to the budget, especially the investments linked to the settlement agreed before the budget, was emphasised. Savings were already tracked but the metric was to be changed from a RAG status to a financial number.

17/24   COMMITTEE ACTION AND RECOMMENDATION TRACKER
(Agenda Item 8)

Having reviewed the progress of actions and recommendations the Committee **NOTED** the action and recommendations tracker.

18/24   COMMITTEE FORWARD WORK PLAN
(Agenda Item 9)

The Committee resolved to **AGREE** the proposed forward work plan, having taken account of the Cabinet Forward Plan and the Budget Management Monitoring Report subject to the following amendments:

- A report in 6 months on the progress of the Commercial Strategy, to pick up issues discussed (training programmes, risk register, funding allocation, review of the term 'Commercial', and worked examples of transformation project as it progressed through the governance structures).

19/24 CABINET RESPONSES TO RECOMMENDATIONS
(Agenda Item 10)

The Committee **NOTED** the Cabinet responses submitted. In response to the Social Value recommendations, clarity was requested on the scope of the first recommendation, and a timescale for implementing the final one.

20/24 CONFIDENTIAL MINUTES
(Agenda Item 11)

The confidential minutes of the 19 January 2024 meeting were **AGREED** as a true and accurate record.

.... in the Chair

Date of signing   ....

Divisions Affected – All

PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

19.07.2024

COMMUNITY WEALTH BUILDING AND WIDER SOCIAL VALUE

Report by
Stephen Chandler - Executive Director of People and Transformation

RECOMMENDATION

1. **The Committee is RECOMMENDED to**

   - consider the report in the committee's policy-shaping capacity, and to provide feedback

   - **NOTE** the report, and **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

Executive Summary

2. *This paper presents an update on Oxfordshire County Council's strategic approach to tackling economic inequality through community wealth building (CWB) initiatives, aligning with the council's mission for a Greener, Fairer, and Healthier Oxfordshire. Building upon previous initiatives, the council has collaborated with the Centre for Local Economic Strategies (CLES) and anchor institution partners to explore CWB practices for Oxfordshire. The council aims to lead by example in promoting CWB principles and reviewing and strengthening its commitments to the Oxfordshire Inclusive Economy Partnership. As the council assumes strategic economic functions, there is an opportunity to integrate CWB initiatives as a key element of economic development strategies and the broader work of the council.*

   This paper reports on the findings of the CLES research and looks at CWB in the context of a new draft broader definition of social value, beyond the existing policy that applies specifically to procurements affected by the Social Value Act. The purpose of engaging with Performance and Corporate Services Overview and Scrutiny Committee is to gain feedback in the first steps of a longer process to develop a more comprehensive Community Wealth Building and Social Value Strategy.

Tackling deprivation and economic inequalities in Oxfordshire – a Community Wealth Building approach

3. During 2023/24, officers developed actions and policy relating to the 'fairer' element of the council's 'greener, fairer, healthier' visions, particularly with respect to financial inequality. Alongside short-term cost of living programmes, officers have explored interventions that can be shown in other places to have tackled cycles of deprivation over the long-term.

4. The development of Community Insight Profiles in the 10 most deprived wards in Oxfordshire, and the targeted investment of health-related grant funding in those areas, has highlighted strong evidence for the correlation between economic and health inequalities in Oxfordshire. Oxfordshire's Health and Wellbeing Strategy also acknowledges this link, making clear that efforts to tackle health inequalities must also look at other inequalities that impact the health and life outcomes of Oxfordshire residents.

5. Members will have seen the Cost-of-Living Programme report that came to Cabinet in May 2024, and the update report to Performance and Corporate Services Overview and Scrutiny Committee in November 2023. These reports indicated how the council intends to spend the Household Support Fund and other locally funded investment. Further allocations of this fund from central government is positive news, however, as was noted at Committee in November 2023, a longer-term approach to addressing the fundamental problem of economic inequality across Oxfordshire is needed. Supported by a dedicated budget to develop a Community Wealth Building and Social Value Strategy, this paper outlines a shift in approach from short term crisis interventions to a set of longer-term actions that will inform a wider strategy.

6. The principles of Community Wealth Building (CWB) outline how the council can use its economic activities (such as procuring goods or services, employing staff and owning land/assets) to generate reinvestment in the local economy (specifically in local people) which supports Oxfordshire to become *fairer, healthier and greener*. Community Wealth Building is not limited to the economic activity of the council, it also requires us to explore our role in shaping an approach to economic development that brings benefits for people and place in Oxfordshire.

7. Funding carried forward from the 2023/24 cost of living programme will seed-fund more sustainable interventions and additional specific funding provisions made in the 2024/25 revenue budget for the development of a Community Wealth Building strategy mean that a total of £350,000 is available for CWB and related initiatives in 2024/25. Related ongoing provisions were also made in the budget from 2024/25 onwards for the development of a social care cooperative hub, and corporate membership of the Cooperative Councils Innovation Network.

Community Wealth Building – What is Oxfordshire doing well already?

8. This programme of work is not starting from scratch, there are many elements of Community Wealth Building principles that the County Council and partners in Oxfordshire are already enacting.

- Since implementing the Social Value Policy in 2022, Oxfordshire County Council has delivered £2.7million worth of social value through contracts that are above the social value procurement threshold.

- The Oxfordshire Inclusive Economy Partnership (OIEP) has catalysed significant interest in and progress towards creating a fairer and more accessible economy in Oxfordshire.

- Employment and skills programmes delivered in collaboration with the LEP and local voluntary sector organisations, and initiatives like the County Print Finishers that provides supported employment opportunities are successful examples of expanding access to the wealth generated by jobs in Oxfordshire. The County Council also champions apprenticeships through direct employment opportunities and through social value contributions from suppliers.

- Oxfordshire has a strong social economy, having been recognised as a Social Enterprise Place, and being home to numerous Community Action Groups.

The CLES Recommendations Report – Key Findings

9. From November 2023 to March 2024 the council engaged in a project with CLES, the output of which was a report that highlights where Oxfordshire is doing Community Wealth Building well, and gives recommendations for further action. The research report is intended as a base-line to work from and plan future strategy and actions around.

10. Attached as Annex A is the full CWB recommendations report, developed by CLES. The report provides a challenging set of recommendations with a range of more immediate and longer-term actions.

11. The report moves thematically through the five pillars of community wealth building. Below is a summary that highlights some of the key areas that officers are seeking to take forward in the 24/25 financial year, subject to any decisions required:

Economic Development

o Work to make community wealth building a central principle of local economic development, including specific support for small businesses and entrepreneurs who are less likely to access current support and finance through, for example, the BIPC

Spending and Procurement

- o Develop a definition of social value that goes beyond procurement.
- o Invest in co-produced training and toolkits for contract managers/commissioning officers/procurement officers to empower them to actively promote the maximum potential of social value.
- o Analyse the impact of procurement spend locally.

Land and Property

- o Review the Community Asset Transfer (CAT) policy to ensure the financial sustainability of arrangements and creating a connection with business support offers.

Employment and Skills

- o Develop an options paper that enshrines the Council's commitment to fair wages.
- o Map OCC's recruitment profile in terms of socio-economic status.

Social Economy

- o Invest in membership of the Cooperative Councils Innovation Network and ensure that members and officers are gaining maximum benefit from the membership.
- o Work with key partners who support social enterprises to provide greater access for residents who live in areas of high deprivation and develop proposals for prototyping social care cooperatives.
- o Review the accessibility of bureaucratic processes for VCSE organisations (e.g. level of insurance required, consistency of process, exemptions for trusted partners).
- o Learn from the expertise of 'community wealth builders' in Oxfordshire who have pioneered social enterprises and community-owned projects.

12. Officers are using the CLES report as a basis to design a programme of CWB work for the 24/25 financial year. This action plan is being costed and will be outlined at Cabinet in the autumn. In the meantime, actions are being delivered as they are identified through existing delegations and in consultation with the relevant portfolio holders.

13. The next year presents an opportunity for OCC to lead and learn when it comes to embedding CWB. The actions below indicate some of the longer-term ambitions that officers will be working towards with regards to economic development:

- Continued involvement in and support for the development of the anchor network as a forum for driving forwards inclusive economy actions and county-wide place-shaping

- Support the OIEP to be in a position to deliver ambitious collaborative projects

- Integrating community wealth building principles into economic development functions that makes the most of the expertise in the County and better connects more communities to the benefits of the local economy

Defining Social Value in the context of Community Wealth Building (CWB)

14. Previous feedback from the Performance and Corporate Services Overview and Scrutiny Committee, and the outcome of the Community Wealth Building report from CLES, have led to the development of a new draft definition of Social Value. The Council's Social Value Policy, approved in 2022, provides a specific definition of generating social value which is linked to the 2012 Social Value Act. This additional statement (attached as Annex B) seeks to build on that definition into areas beyond with those specifically dealt with in the act.

15. The *draft* Social Value Definition Statement details what the council means by generating social value 'beyond procurement'. The statement will align community wealth building with efforts to develop a broader understanding of social value. The statement provides a set of definitions, and a set of principles that can guide the generation of social value beyond that which is covered by the specific requirements of the Social Value Act. It is a first draft for engagement with the organisation, stakeholders and Scrutiny and once reviewed and agreed by Cabinet at a future date, will necessarily need to be iterative as the Council changes and learns.

16. To provide greater clarity for the organisation, and avoid confusion around technical and non-technical meanings, Annex B provides definitions for social value in different contexts:

- **Social Value** - any additional economic, social or environmental benefit generated in any areas of activity carried out by OCC in the way it conducts business, rather than in the specific services it delivers

- **Social Value as defined in the Social Value Act** - additional economic, social or environmental benefit generated through the procurement of goods, works or services from the Council's suppliers and the supply chain as a direct requirement of the Social Value Policy and the Social Value Act 2012

17. Generating social value through council activities is just one element of community wealth building. CWB has strong connections into other policies and areas of work that seek to tackle inequalities and build community resilience.

Corporate Policies and Priorities

18.   As a policy framework, CWB is rooted in tackling financial inequality, and therefore has significant cross-over with efforts to tackle health inequalities and to support community resilience.

19.   The Health and Wellbeing Strategy (HWS) sets out the importance of anchor organisations in supporting communities to remain healthy and well. The HWS outcomes framework outlines actions pertaining to community wealth building, particularly in delivering its priorities relating to *financial wellbeing*, *healthy homes* and *community resilience.* Community wealth building supports ongoing efforts to tackle the building blocks of health through healthy place shaping. Principles such as 'plural ownership of the economy' are already in use as part of the Community Insight Profile programme that uses delegated grant-making to involve communities directly in access to funding.

20.   The Oxfordshire Way seeks to invest in community resilience, and to give residents access to the support they may need in their own communities, and to prevent further deterioration of their situation into crisis. In terms of deprivation, community wealth building interventions seek to prevent residents from slipping into crisis by providing greater access to the wealth and support that would meet their needs. Whether that be through skills, education and good employment, or through repurposing underused land as growing spaces or as a community centre for example. Extending the Oxfordshire Way into a cross-organisational transformation programme will mean encompassing a group of intersecting approaches including innovative community-led delivery with more holistic economic development practice. In this context CWB is essential for supporting the council's commitment to increase community resilience.

21.   Community wealth building principles can be found in action in work that is already ongoing across the council, including the council's approach to inclusive employment (People and Culture Strategy) as well as the approach to consumption (Circular County Strategy). The Oxfordshire Food Strategy is closely aligned with supporting CWB, as is the grant funding programme to Community Action Groups that directly support CWB initiatives already underway in the community.

22.   CWB is a set of approaches that seek to widen the access that local people have to the wealth held in Oxfordshire's economy. Good community wealth builders are anchors in the local place, cognisant of the impact they have as an economic unit, as well as a service provider. Community wealth building will facilitate access to financial wealth, or property that brings investment to local people. In addition, CWB will also generate wealth for local people in the form of security, cultural capital, relationships, agency and power for example. In its role as place-shaper and partner of choice OCC has an opportunity to inform and influence other anchor organisations, supporting shared learning and the delivery of commitments to inclusive economy and climate change priorities, which were made as a system.

23. The purpose of working with CLES was to understand how the council can take steps to become a leading 'community wealth builder' and how this learning can be applied to support the council's role as an anchor and signatory to the Oxfordshire Inclusive Economy Charter.

24. A Community Wealth Building approach aligns strongly with the missions identified in the new Commercial Strategy that is in development for the County. Namely commitments around thoughtful value creation, strategic thinking about how actions impact the wider 'system' and collaboration with a variety of partners to effectively work towards shared goals.

Financial Implications

25. Provision has been made for the development of a community wealth building strategy within the 2024/25 revenue budget. A Cabinet report in May 2024 also set out how funding carried forward from 2023/24 will be used to support initial CWB actions. There are no additional direct financial implications. However, any change to policy resulting from the implementation of CWB approaches will need to be assessed separately for any financial implications.

    Comments checked by:

    Thomas James, Head of Finance Business Partnering,
    thomas.james@oxfordshire.gov.uk (Finance)

Legal Implications

26. There are no legal implications in the report.

    Comments checked by:

    Paul Grant, Head of Legal and Deputy Monitoring Officer
    paul.grant@oxfordshire.gov.uk (Legal)

Equality & Inclusion Implications

27. Community wealth building work will have a positive impact on residents, especially those from areas of high deprivation, by generating an increase in the wealth retained and owned by the community. Low-income and deprivation is often intersectional with issues faced by people with protected characteristics. For example, a recent Joseph Rowntree Foundation report indicated that nearly half of everyone in poverty is either a person with disabilities, or lives with a person who has disabilities[1].

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[1] Nearly half of everyone in poverty is either a disabled person or lives with a disabled person | Disability Rights UK

Sustainability Implications

28.   Community wealth building approaches are aligned with circular economy principles, namely supporting local and regenerative economic practices, that reduce the extraction and transportation of resources.

Stephen Chandler
Executive Director of People and Transformation

Annex: Annex 1 – CLES Community Wealth Building Recommendations Report

                                         Annex 2 – Draft Social Value Definition Statement

Background papers: Cost of Living Programme Report, Report to Performance and Corporate Services Overview and Scrutiny Committee, 10 November 2023
                                         Cost of Living Programme for 2024/25, Report to Cabinet, 14 May 2024

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July 2024

Embedding Community Wealth Building into Oxfordshire County Council

A Framework for Action
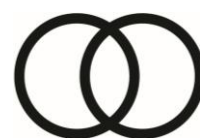
CLES
the national organisation
for local economies

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Summary of Recommendations

Economic Development:

1) Prioritise Community Wealth Building in economic development practice.
   a. Establish a vision for progressive local economic development.
   b. Capture impact through a broad set of metrics.
   c. Ensure officer capacity to deliver economic development practices informed by the five community wealth building principles.

Spending and Procurement:

2) Leverage procurement for Community Wealth Building in Oxfordshire.
   a. Ensure procurement leads are supported to incorporate community wealth building approaches into practice.
   b. Analyse collective levels of local authority spend in Oxfordshire.
   c. Support the development of locally relevant TOMs.[1]
   d. Engage potential suppliers.

Land and Property:

3) Deepen the progressive practice of land use and disposal across the Oxfordshire footprint.
   a. Use surplus public land to support affordable housing and business space.
   b. Develop a community wealth building land use strategy for the county to influence local plans and anchor institution policy and practice relating to land use and disposal.
   c. Review the property and asset portfolio of the County Council to inform community asset transfers.

Employment and Skills:

4) Implement lessons learned from the social contract programme and ensure ongoing funding.
5) Target Employment among the County's anchor institutions.
   a. Encourage Oxfordshire's anchor institutions to map employment profiles.
   b. Encourage anchor institutions to target employment opportunities towards deprived postcodes.

Social Economy:

6) Consider the utility of the current business support offer.
   a. Audit business support alongside the Voluntary, Community and Social Enterprise (VCSE) sector to better understand the appropriateness and availability of the business support offer in Oxfordshire.
   b. Following an audit, consider additional support and available funding streams.

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[1] TOMs refers to reporting standards for measuring social value: Themes, Outcomes, Measures.

Introduction

Many localities across the UK are embracing inclusive economy ambitions, aiming to surpass traditional economic development approaches that have fallen short in delivering widespread social, economic, and environmental benefits at scale.[2]

In some areas, this aspiration is driving a shift towards more progressive forms of local economic development, with community wealth building approaches now taking centre stage.[3]

Community wealth building represents a progressive approach to economic development, aiming to reshape conventional economic systems to enhance the flow and wealth and opportunity for local residents and communities. Central to this, is the mobilisation of the economic powers of large, locally-rooted entities, known as anchor institutions, which include councils, hospitals, universities, colleges and housing associations. The strategic deployment of these institutions' financial resources, employment practices, and assets such as land and property can significantly influence the prosperity and wellbeing of local communities.[4]

Oxfordshire County Council is currently exploring how local infrastructure and resources can be harnessed as key drivers of health and wellbeing through community wealth building approach.

About this Report

This report provides a framework for action, to guide Oxfordshire in implementing a range of community wealth building interventions.

We begin in chapter one by setting out the art of possible. While Oxfordshire has a set of distinct opportunities and challenges, we sketch out in broad terms how the five principles of community with building can be used to build a more inclusive local economy, where wealth and power serve local people, using examples of emerging practice from across the UK. Subsequent sections delve into the practicalities of implementing these interventions. Using a thematic approach, these sections are structured around the following headings:

- Economic development;

- Spending and procurement;

- Land and property;

- Employment and skills; and the

- Social Economy.

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[2] TL Goodwin (2022). A new progressive economy is already being built locally. The New Statesman. Link.
[3] TL Goodwin et al (2022). A light in the dark: progressive frontiers in local economies. Link
[4] CLES (2023). Briefing: Community wealth building 2023 – a guide for new councillors. Link.

This framework for action draws on insights gathered through a series of consultations with local stakeholders, including local authority officers, health practitioners, and representatives from the voluntary, community and social enterprise (VCSE) sector. Each section contains a summary of existing activities in Oxfordshire that align with community wealth building principles, as well as the obstacles that must be addressed for successful implementation. Utilising these insights, each section also contains a series of key actions that serve as a foundation for future initiatives, outlining the necessary steps to develop a robust community wealth building programme in Oxfordshire.

1. The Art of the Possible

"We have a vision to lead positive change by working in partnership to make Oxfordshire a greener, fairer and healthier county. This means working closely with our residents, partners and wider communities to make Oxfordshire the very best place it can be."

[Leader's Foreword, Oxfordshire County Council Strategic Plan]

Oxfordshire: A Tale of Two Counties

Oxfordshire stands out as one of the UK's economic powerhouses, making substantial contributions to the national treasury generating an economic output of around £23 billion of Gross Value Added (GVA) each year.[5]

The County's economic dynamism is driven by research and innovation, particularly in fields such as life sciences, clean energy, and artificial intelligence. Home to the world's top-ranked university, Oxfordshire nurtures one of the best qualified populations in the country, with the highest concentration of knowledge workers.[6] Research, innovation and science hubs are also well spread throughout the County, with Harwell Science and Innovation Campus in the Vale of White Horse,[7] Culham Campus and South Oxfordshire.[8]

Recent achievements include attracting substantial inward investment, exemplified by Moderna's plans for a major manufacturing hub[9] and BMW's £600 million investment in the MINI plant, which already employs over 3,400 individuals.[10] Furthermore, Oxfordshire leads the UK in terms of 'good growth', with Oxford topping PwC's 2021 Good Growth for Cities report, which measures the performance of cities against key economic and wellbeing indicators, such as employment, health, income and skills.[11] Notably, Oxford City has maintained an unemployment rate of under 1% for a significant period, coupled with growth in private sector jobs.[12]

Despite notable economic successes, Oxfordshire grapples with significant challenges, particularly concerning income disparities, housing affordability, and health inequalities. Income inequality is stark, especially in Oxford, where a considerable portion of the population earns below the national real living wage of £9 per hour, with gender and employment status exacerbating these disparities.[13]

In education, while Oxfordshire generally outperforms the national average, disparities persist among demographic groups and localities. Disadvantaged pupils trail by 6 percentage points in

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[5] OxLEP (2018). Oxfordshire: a trailblazer for the UK economy. Link.
[6] Oxford Strategic Partnership (2024). Link.
[7] Harwell Campus. About. Link.
[8] Culham Campus. About. Link.
[9] Oxford Mail. (2023). Moderna builds new manufacturing hub in Oxfordshire. Link.
[10] BBC. (2023). BMW application for Cowley Mini plant changes approved. Link.
[11] PWC (2021). Good Growth for Cities: The local economic impact of COVID-19. Link.
[12] Centre for Cities (2016). Fast Growth Cities: The opportunities and challenges ahead. Link.
[13] Oxford Strategic Partnership and OxLEP. Oxfordshire Inclusive Economy Initiative Summary Report Findings. Link.

Early Years development and by 2.9 percentage points in attainment 8 scores at KS4.[14] Additionally, the evolving economic landscape leaves a significant portion of the population unable to benefit from local prosperity gains, compounded by the dominance of Oxford University, which disproportionately benefits specific post-doctoral demographics in high-growth industries.

Housing affordability presents a critical long-term challenge, with Oxford ranking as the least affordable city in the UK. Average house prices exceed 15 times the average salary, while monthly rents are among the highest in the South East.[15],[16] Oxford builds significantly fewer homes compared to cities with lower demand, exacerbating the housing crisis and contributing to a growing homelessness problem.[17] Stark disparities persist in social housing tenancies, mortgages, and homeownership opportunities, compounded by intergenerational poverty and limited social housing availability outside Oxford.

While Oxfordshire generally experiences low levels of deprivation, specific wards like Blackbird Leys, Barton, and Sandhills face significant challenges, with above-average rates of residents living in income deprivation and experiencing prolonged periods of unemployment.[18][19] According to the English Indices of Multiple Deprivation (IMD) 2019, three of Blackbird Leys' four Lower-layer Super Output Areas (LSOAs) rank among the 20% most deprived in England, particularly in education, skills, and training.[20] Additionally, IMD indicators reveal significant inequalities in Banbury – a district with some of the most deprived areas in the County – with six LSOAs ranked within the 20% most deprived areas nationally, and seven areas ranking in the 10% most deprived nationally on education and skills indicators specifically.[21] Health indicators in the area are also notably worse than the national average, especially in terms of the prevalence of depression.[22] Outside of inner-city wards, concealed pockets of deprivation persist within market towns and villages, often escaping detection by conventional measures like the IMD. Rural poverty is hidden, scattered in small pockets that sit alongside areas of wealth. Combining data from the 2021 census with the new Ethnic Group Deprivation Index (EGDI), which breaks down IMD by ethnic group, can reveal an otherwise hidden cluster of people experiencing significant economic hardship.[23]

In addressing these challenges, Oxfordshire aims for prosperity across all neighbourhoods, with concerted efforts from the County Council, local districts, and anchor partners. By confronting underlying issues of inequality and deprivation, Oxfordshire strives to foster a thriving and equitable community where all residents can flourish.

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[14] Oxfordshire Education Commission. (2023). Time for change: improving educational opportunity for all Oxfordshire's children and young people. Link.
[15] Oxford City Council. Housing Statistics. Housing Affordability. Link.
[16] Valuation Office Agency. (2019). Private Rental Market Statistics, 'Room' monthly rents recorded between 1 April 2018 and 31 March 2019 for the South East. Link.
[17] Centre for Cities. (2024). Cities Outlook 2024. Link.
[18] Oxfordshire County Council. (2019). Oxfordshire Insight: Deprivation. Link.
[19] Oxfordshire County Council. (2020). Some are more equal than others: Hidden inequalities in a prospering Oxfordshire. Link.
[20] Oxfordshire JSNA. (2020). Blackbird Leys Settlement profile of Health and Wellbeing Evidence. Link.
[21] Oxfordshire JSNA. (2019). Banbury: Community Profile of Health and Wellbeing Evidence. Link.
[22] Ibid.
[23] The Guardian (2023). High-end bikes and overcrowded homes: where poverty hides in Oxford, Link.
Note that at the time of writing, the EGDI data is not publicly accessible.

Leading Lights

In seeking to deliver widespread prosperity for people and communities, Oxfordshire is not alone. But while, many places now aspire to have more inclusive economies, this renewed strategic purpose has, in the main, led to areas trying to squeeze more benefits for local people and places out of inward investment opportunities as well as the continued reliance on property development-led regeneration.[24]

It remains to be seen, therefore, as to whether this will be enough to turn the dial here and have a positive impact on poverty, deprivation and inequality. Recent analysis by CLES shows that while foreign direct investment (FDI) has increased in almost all English city regions, for example,[25] this has not correlated with a positive impact on deprivation.[26]

This is not to say, of course, that local economic development practitioners should not be trying to squeeze as much as they can out of inward investment. But in addition, they should also be looking to diversify their approach to produce wider social, economic and environmental benefits at scale.

To this end, some areas are starting to tread a different path.[27] Here community wealth building has become a much more embedded approach, with local place-based assets becoming the focus of local economic development practice. This has resulted in the adoption of the following interventions and tactics with a greater focus on the grass roots economy.

Vision and Metrics

Minimising the extraction of wealth and building prosperity for all should be the intention of local economic strategy. Local economies everywhere should now be rejecting the idea that the sole measure of economic success is growth and should be including additional metrics for wellbeing, happiness, the reduction of poverty and carbon emissions. While economic strategy and planning falls under the jurisdiction of local governments, they should unite and inspire here, encouraging and enabling other anchor institutions, communities and the VCSE sector to play a key role in establishing an inclusive local economy vision. CLES's recent work with Newcastle, to produce a new inclusive economic strategy is a key example of this approach.[28]

Diversifying Ownership

The development of inclusive local economies also means growing more diverse forms of ownership such as co-operatives, social enterprises and community businesses. Recent research by CLES has highlighted that employee-owned businesses, for example, tend to be more resilient, less indebted, pay higher wages and more productive.[29] To this end, councils such as Islington

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[24] TL Goodwin et al (2022). A light in the dark: progressive frontiers in local economies. CLES. Link.
[25] Office for National Statistics (2021). Foreign direct investment involving UK companies by UK country and region, (directional): inward. Link.
[26] Office for National Statistics (2019). English Indices of deprivation 2019. Link.
[27] TL Goodwin et al (2022). A light in the dark: progressive frontiers in local economies. CLES. Link.
[28] Newcastle City Council (2023). Newcastle Inclusive Economic Strategy: Wealth that flows to all. Link.
[29] S Benstead and J Heneghan (2022). Owning the workplace, securing the future. CLES. Link.

have diversified their business support offer by commissioning a social enterprise hub and a co-operative development agency.[30]

With support from Power to Change, Liverpool City Region has invested £6.5m to support the development of local socially trading organisations. With this funding they have established Kindred - a new investment and development vehicle, owned and run by the sector, which is now providing business support and funding to local community businesses.[31]

In Greater Manchester, the combined authority is establishing an inclusive ownership platform to support and grow co-operative, mutual, social and community enterprises in key sectors of the everyday economy such as childcare.[32]

In North of the Tyne, the combined authority has been working with a group of supply teachers and local trade unions to create a supply teacher co-operative. Owned and controlled by the teachers themselves, the co-operative will replace the prioritisation of profit with an imperative to pay fairly and provide good terms and conditions for teachers.[33]

Harnessing the Power of Public Procurement

Looking for opportunities to support and influence the behaviour of local SMEs is emerging as a key local economic development tactic to promote a more inclusive local economy. As a result of Covid and the need to administer business support grants, many councils now have increased intelligence about the nature of their local SMEs.[34]

In councils such as Fife, Luton and Carmarthenshire, they are using this intelligence to target their own procurement expenditure towards growing and diversifying their local SME base. Here, economic development officers are engaging with local SMEs to make them aware of their goods and services pipeline, with a view to more of their supply chains being delivered by these local businesses. Through this engagement these local authorities are using this as an opportunity to address the environmental crisis – supporting local SMEs with retrofit and access to environmental grants. They are also encouraging the adoption of the living wage, as well as initiating discussions around succession planning, to potentially transition to worker ownership. This enables these local businesses to grow and develop with greater social and environmental purpose.

Building Inclusive Skills and Employment Pathways

Local anchor institutions often have significant numbers of jobs with good terms and conditions that can be targeted towards people and communities who need them the most.

In the West Midlands, the Birmingham & Solihull Integrated Care System, in partnership with the Birmingham Anchor Institution Network, is leading a programme known as ICAN across all of its employing providers. The three-year programme will deliver job opportunities for unemployed and young people, targeting economically disadvantaged areas across Birmingham and Solihull. It

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[30] CLES (2022). Community wealth building in Islington (2018-ongoing). Link.
[31] Kindred (2021). What we do. Link.
[32] Greater Manchester Combined Authority (2022). Launch of the report from the Greater Manchester Independent Inequalities Commission. Link.
[33] F Jones (2022). Unions tackling wealth extraction on the front line. CLES. Link.
[34] Local Government Association (2021). Supporting councils with business engagement. Link.

includes the provision of tailor made "get into work" development and support programmes, with careers, interview, application support and a programme of post-employment mentorship. The programme launched in November 2021 and has to date delivered 239 job outcomes with a further 322 applicants either currently in, or awaiting, training.

Using Land and Property to Build Community Wealth

How land and property assets are owned and managed are key features of any local economy. A community wealth building approach here is about using public land in a more purposeful way to build affordable housing, support local business and community activity.

For example, in 2017 Salford City Council launched Dérive, a wholly owned council-company set up with £2m of Section 106 funds.[35] Working in partnership with local housing associations, Dérive aims to deliver high-quality, truly affordable mixed tenure homes, on Council-owned, under used sites. The homes will be sustainable and provided at below average rent. Dérive has an ambition to deliver 3,000 new council and community-owned homes over the next ten years, forming Salford's largest council housing scheme for 50 years.

This approach also provides the opportunity to leverage additional social value in the form of construction training, apprenticeships and jobs that are targeted to local residents.

Furthermore, a community wealth building lens is now being applied to inform planning decisions. Through their ambitious local pan, for example, Preston City Council now requires developments that pass a size threshold to contribute to local job creation, create training and upskilling opportunities for local people and support local supply chains through procurement. Preston contracts a local social enterprise to monitor delivery, whose services are paid for by the developer.

Making Financial Power Work for Local Places

Despite the highly challenging funding environment for local government, community wealth building ambitions have, for example, seen local government pension funds used to fund local housing.[36]

More broadly, levers such as the Public Works Loans Board have been used by councils such as Salford to purchase a local shopping centre to redevelop and revitalise one of their local town centres and support local and social businesses through favourable tenancy agreements.[37]

Carmarthenshire council in southwest Wales have used levelling up fund monies to purchase a Debenhams and are working with their local health board to turn this into a health centre with a view to not only improving local services but also driving footfall on the local high street to help local business.[38]

CLES have also recently worked with APSE to produce a toolkit to maximise the levelling up fund's impact in local economies.[39] This toolkit, integrates five critical checks for project evaluation and

[35] Dérive Salford. (2019). Dérive business plan 2019/20. Link.
[36] CLES and Preston City Council (2019). How we built community wealth in Preston: achievements and lessons. Link.
[37] N Tague (2023). City Council is in the market. The Big Issue. Link.
[38] TL Goodwin et al (2022). A light in the dark: progressive frontiers in local economies. CLES. Link.
[39] CLES and APSE (2023). Getting the most from levelling up: A toolkit for maximising impact in local economies. Link.

delivers best practice recommendations. It stands as a valuable resource for authorities, facilitating the optimisation of social, economic, and environmental outcomes from their initiatives.

Does it Work?

Determining the effectiveness of real-world interventions like community wealth building is notoriously hard. Nevertheless, recent research by the University of Liverpool, University of Central Lancashire, Lancaster University and us here at CLES, shows that community wealth building in the city of Preston, for example, is having a positive impact on the health and wellbeing of its residents.

Our research found that during the period in which Preston's community wealth building programme was introduced, there were fewer mental health problems than would have been expected compared to other similar areas, as life satisfaction and economic measures improved. The introduction of the programme was associated with a 3% decline in antidepressant prescribing, and a 2% decline in the prevalence of depression, along with a 9% improvement in life satisfaction, and an 11% increase in wages, compared to expected trends. As our recent paper in the Lancet Public Health concludes, these interventions potentially provide an effective model for economic development that leads to substantial health benefits.[40] While the data does not measure demand for services specifically, it can be expected that the evidenced improvements in mental health will reduce demand for mental health and wellbeing related services.

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[40] Rose, T et al. (2023). The mental health and wellbeing impact of a Community Wealth Building programme in England: a difference-in-differences study. The Lancet Public Health. Link.

2. Economic Development

Progress to Date

Economic development practice across Oxfordshire has strong roots in inclusive economy principles. The Oxfordshire Inclusive Economic Partnership (OIEP) has convened over a hundred organisations county-wide, spanning employers, businesses, educational institutions, community groups, and local government, to tackle pressing challenges collectively.

Notably, the development of the **Inclusive Economy Charter** promotes action through pledges that organisations sign up to, recognising the importance of supporting an inclusive economy across Oxfordshire. Over 50 organisations have signed or are in the process of signing the Charter. These signatories have made approximately 600 pledges, covering actions addressing social issues and supporting community development, including the transfer of unused apprenticeship levy, employee volunteering for community projects, mentoring, and more.[41]

To further the mission outlined in the Charter, the OIEP has established a number of **action-focused groups** to drive inclusive economic growth. The action groups have made progress in advancing the goals outlined in the OIEP's Delivery Plan 2023-24. For example, they have actively assessed funding opportunities for educational programmes like ARCh (Assisted Reading for Children) and pursued funding for a social value brokerage system for local authorities to maximise the impact of economic activities within the community.[42]

Squeezing More Juice from Inward Investment

In redefining Oxfordshire's approach to inward investment, stakeholders emphasised the imperative for more strategic measures. While acknowledging successes like Moderna's job creation, there's a resounding call to extend the benefits beyond GVA. Embracing disruptive approaches, such as leveraging local plans, holds the potential to significantly enhance inclusive economic development, ensuring that prosperity reaches all corners of the community.

"Oxford, in particular, is a global brand which attracts investment, contributing to wealth creation. Take Moderna, for example, which has created 300 jobs, primarily low-entry level manufacturing roles. While we recognise and embrace our global brand, there's an opportunity for more disruptive approaches, such as leveraging local plans to enhance inclusive economic development."

The alignment of investments with broader social and environmental goals emerges as a central theme, particularly in addressing the needs of deprived communities, especially those situated in market towns; thereby ensuring that economic endeavours not only generate financial returns but also contribute positively to the wellbeing of residents and the environment.

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[41] Future Oxfordshire Partnership. Inclusive Economy Charter. Link.
[42] Oxfordshire Inclusive Economy Partnership, Annual Report, 2022-23. Link.

"There could be more conditions for investors, e.g., around pathways to employment for disadvantaged local communities. There are conversations to be had around the alignment of these investors ESG aspirations, and the County Council's inclusive economy aspirations, and what we want as part of that."

Nevertheless, despite optimism in the finance and investment landscape, particularly due to the *"scale of positive investors and prevalence of anchor institutions, who express an interest in social investment"*, concerns persist regarding the alignment of local investment with local needs and the available mechanisms to drive it.

Moreover, stakeholders highlighted the importance of capitalising on alternative resources available to the County for fostering economic development, recognising the limitations of relying solely on inward investment. In this context, there is significant interest in exploring the potential of the Shared Prosperity Fund to complement existing investment efforts. However, challenges exist in coordinating the utilisation of these funds effectively, underscoring the importance of aligning fund allocation with local economic strategies and priorities.

"We recognise the need for place-based interventions, but face challenges in implementing them due to lack of political focus at local level."

With the transfer of Local Enterprise Partnership (LEP) functions to the County Council, stakeholders see a critical opportunity to synchronise efforts, ensuring the fulfilment of commitments and propelling Oxfordshire toward a more inclusive and prosperous economic future. This transition presents a unique moment to align functions and resources, leveraging collective strengths to address existing challenges and seize emerging opportunities for growth and development across the County.

Summary

Inclusive economic development in Oxfordshire has strong foundations. However, progressive practice could go further. In summary, stakeholders advocated for a more strategic and inclusive approach to inward investment, aligning economic development efforts with community wealth-building principles. By taking action to prioritise social progress alongside financial gains, Oxfordshire can lead the way in raising the ambition of investors to support greater local economic inclusion.

Key Actions

1. **Prioritise Community Wealth Building in Economic Development Practice:** With the LEP functions transferring to the County Council, bringing business data and institutional knowledge, there is an opportunity to build a new economic development function in the council. The County's Strategic Economic Plan (SEP) looked to advance community wealth building principles and ensure that economic growth is sustainable and retained locally. With a view to advancing these ambitions, there should be an even greater imperative going forward to grow and develop the economy from within and to get more wealth to circulate locally. This can be done by committing to the following actions:

   a) **Establish a vision for progressive local economic development:** Building on the activity to date, community wealth building should be the central narrative which underlies all activity going forward. Supporting the growth and development

of local SMEs, as well as other forms of socially trading business and promoting employment and skills opportunities across Oxfordshire should be prioritised, as per the key actions in the subsequent sections When it comes to inward investment, Oxfordshire should be bold here. Oxfordshire is an attractive place to invest, and the Council should seek secure maximum benefit by aligning its community wealth building principles with investors' ESG goals. This should include an ask for investors to support employment pathways for people and communities from specific areas of high deprivation and support local supply chains within those areas.

b) Capture impact through a broad set of metrics: Capturing impact through a broad set of metrics is also important and there is a real opportunity for the County to look beyond traditional measures such as GVA and include the kinds of equality and health outcomes that it wants the local economy to generate. A recent report to the Organisation for Economic Co-operation and Development (OECD) proposes that today's primary goals should be environmental sustainability, falling inequality, rising wellbeing (including, but not only, incomes) and strengthening resilience. Adapting and adding to these measures, we propose a broad set of metrics below. (See Figure 1).

c) Ensure officer capacity to deliver economic development practices informed by the five community wealth building principles: Following the transfer of LEP functions, the Council should ensure that there is capacity for officers with a corporate function to deliver strategic economic development practice with a focus on community wealth building. Officers with this capacity should sit across council functions from procurement, property and assets, planning, employment, and finance.

Figure 1. Measuring Impact, CLES

Metrics (indicative)

Skills and employment:

Skills levels, unemployment rates, jobs paying the living wage, gender pay gap, proportion of jobs being accessed from an area with high IMD, availability of childcare and other support.

Health:

Life expectancy, life satisfaction, health inequalities (child and fuel), SIMD, mental health statistics.

Economic:

GVA, business start-up/ survival rate (inc. social businesses), investment capital accessed, flows of wealth, digital connectivity.

Land, transport and environment:

Vacant and derelict land, housing availability and affordability, transport connectivity, protection of natural capital (biodiversity and ecosystem protection), environmental quality, GHG emissions reduction.

2. Spending and Procurement

Progress to Date

In the ongoing journey to enhance collaboration and maximise the impact of public expenditure, Oxfordshire's procurement landscape is undergoing transformation, with emerging good practices reflecting a commitment to social value and community wellbeing.

Emerging Good Practice

This is evident in the implementation of **the County Council's Social Value Policy** which **looks beyond the cost of goods and services** and considers the broader aspects of how public spend can enhance economic, social, and environmental wellbeing. Functioning as a "golden thread", the policy is integrated with the council's Strategic Economic Plan, Climate Action Framework, and Equality, Diversity, and Inclusion Framework. The current priorities and expected outcomes of the policy include the creation of job opportunities for military and care leavers, addressing pay gaps, and supporting local community assets. Consultation stakeholders highlighted that the current Social Value Policy has delivered £1.9 million in social value benefits in its first year.

Furthermore, within the Oxfordshire Inclusive Economy Partnership (OIEP), there is a concerted effort to evaluate the importance of social value beyond compliance as stakeholders explained:

"Social value should not be viewed as a mere obligation but embraced as a positive force for societal benefit."

"The chief executives of local authorities and anchor institutions in Oxfordshire are enthusiastic about the anchor network's potential for shared learning, but also for challenging each other and holding each other's feet to the fire in terms of commitments and accountability."

The enthusiasm among chief executives of local authorities and anchor institutions in leveraging the anchor network for shared learning and mutual accountability is palpable. Initiatives like the **social planning procurement working group** at the OIEP are exploring strategies to leverage the considerable impact of the County's vibrant university business spin-offs, numbering around 200—the highest rate in the country. The overarching goal is to shape the business behaviour of these entities, encouraging them to adopt more inclusive practices, such as hiring individuals from areas facing socioeconomic disadvantages.

Additionally, Oxfordshire's anchor institutions stand ready with **growing ambitions to mobilise their spend towards supporting progressive local economic development through localising their supply chains**. For example, anchors across the County are eager to learn from existing practice, such as Oxford Colleges' local food procurement, which enabled local SME food suppliers to access procurement opportunities through a simplified and standardised system. This has provided opportunities for local SMEs to grow with confidence.

While the concept of social value is not universally ingrained in the mindset of local providers, the **OIEP has created a platform aimed at fostering awareness and educating the market**.

Stakeholders suggested that this work could be supported through pre-market events engaging SMEs and VCSE organisations to boost confidence and dispel misconceptions about social value.

From a healthcare expenditure standpoint, representatives of the Buckinghamshire, Oxfordshire, and Berkshire West Integrated Care Board (BOB ICB) have also indicated a strategic shift. The **ICB is starting to move away from competitive tendering**, while aiming **to increase spend with VCSE organisations**. It is now considering a reduced number of contracts, characterised by larger scope and duration. While it was accepted that this approach may pose challenges for smaller, often local organisations, it presents significant opportunities for collaboration, partnerships, or subcontracting with lead providers who secure the contracts.

Despite these promising developments, challenges persist within Oxfordshire's procurement landscape.

A Fragmented Landscape

Consultations unveiled a fragmented procurement landscape, characterised by *"a two-tiered system"* and lack of formal collaboration structures, particularly between the County and District Councils. While *"informal monthly meetings exist for knowledge sharing, a formalised structure is lacking, and colleagues do not consistently work together on projects",* leading to missed opportunities for synergies.

Recognising the inherent challenges posed by a *"siloed procurement landscape"*, ongoing efforts are being made to foster a more cohesive and collaborative approach. Central to this endeavour is the establishment of the OIEP's social value and procurement group, which aims to maximise the impact of economic activities by encouraging businesses to invest in local communities through job creation, training programmes, and environmental initiatives. This is strategically framed to intervene in ways that promise *"long-term financial benefits"* as well as benefits relating to population health and wellbeing.

Application of The Social Value Portal TOMs

Moreover, concerns were raised about the effectiveness of existing frameworks, such as the Social Value Portal TOMs (themes, outcomes and measures), in adequately capturing the value of diverse ownership models. Stakeholders stressed the need for a more *"tailored approach which extends beyond TOMs,"* to incorporate additional narratives relevant to community voices and wealth building. This holistic assessment of social value could be achieved by leveraging tools like case studies to *"demonstrate impact beyond quantifiable metrics."* Stakeholders also advocate for establishing a repository of social value impact measures using examples of successful projects and outcomes, which could serve as proactive narratives.

Disagreement About Social Value Weighting Targets

Disagreement about social value weighting targets emerged during consultations, particularly regarding proposals to increase these weightings. Currently, tenders above £100,000 but below public procurement thresholds apply a minimum social value weighting of 12%, while those above thresholds apply a minimum of 16%.[43]

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[43] Public Sector Executive (2022). 'Oxfordshire County Council's new social value policy'. By Cllr Calum Miller. Link.

Some stakeholders cited advice from the Social Value Portal, emphasising the importance of balancing social value with financial cost, cautioning against excessive weightings. They expressed concerns about allowing the pursuit of social value to overshadow the primary objective of achieving value for money in procurement processes, using the metaphor *"not letting the tail wag the dog."*

However, research from CLES suggests that higher social value weightings, such as 20%, can effectively transform the nature of the commercial economy and offer benefits, particularly in contexts of economic recovery. This presents a nuanced discussion about finding the optimal balance between social value and financial considerations within procurement practices.[44]

Support for the VCSE Sector

Stakeholders highlighted the challenges faced by social economy organisations, particularly small businesses, in accessing public procurement opportunities. Issues such as poor reviews and late payments from anchor institutions were cited as significant barriers to the growth and sustainability of these enterprises. Concerns were raised about the adverse impact of delayed payments, especially for smaller organisations reliant on timely funds to sustain their operations. As one stakeholder noted:

"I think every single provider will agree that we need to be timelier when it comes to payments for smaller organisations, especially where there is a direct contract, we need to take their concerns more seriously, as it can result for some real tricky times for the smaller organisation."

Addressing these challenges requires a coordinated approach. Leveraging the expertise and resources of anchor institutions, alongside exploring innovative financing mechanisms, were identified as crucial strategies to provide much-needed support for early-stage social enterprises. Additionally, streamlining procurement processes and prioritising timely payments were deemed essential steps to enhance opportunities for small businesses within the social economy sector.

Moreover, stakeholders emphasised the importance of creating a level playing field for the VCSE sector in procurement. This involves making procurement proportionate and accessible based on the size and complexity of the tender. Additionally, there is a call for more social licensing[45] to ensure that social and ethical considerations take precedence in procurement decisions.

Summary

Oxfordshire's procurement landscape is evolving to prioritise social value and community impact. Promising initiatives such as the Social Value Policy, OIEP collaborations, and shifts in healthcare procurement practices reflect a commitment to fostering inclusive economic development. However, challenges related to fragmentation, framework effectiveness, and support for the VCSE sector remain. Addressing these challenges will require ongoing collaboration, innovative solutions, and a steadfast commitment to maximising social value for the benefit of all residents.

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[44] Burch, D. (2021). Powering Social Value Through Recovery. Link.
[45] Social Licensing involves restricting supply chains to suppliers that meet certain criteria or a social/ethical threshold.

Key Actions

2) **Leverage Procurement for Community Wealth Building in Oxfordshire:**
Local demand for goods and services in the public sector can be a key driver of a progressive local economic development, supporting the growth and development of local businesses and circulate wealth more equitably. After a year of reporting, OCC procurement has delivered nearly £2.3million in social value benefits and there was a shared feeling among stakeholders that this could be even greater in number. In this, the County Council could use both its convening power and its understanding of the macro picture of the local economy to negotiate and set strategic priorities on a county scale. This role would require leaning into the use of data to identify how influenceable spend could be more locally targeted. First steps for this process include:

a. **Ensure procurement leads are supported to incorporate community wealth building approaches into practice:** As highlighted by the Oxfordshire Inclusive Economy Partnership, there is a lot of emerging practice that sets out to advance the aims and objectives of community wealth building. Procurement leads should be supported through training in best practice and closer working relationships with officers focussed on delivering community wealth building practice. As the Social Value Act embeds, it is important to for procurement leads and teams are aware of best practice and are able explore the legal provisions that enable procurement practice to support community wealth building, such as through tools like lotting contracts, social licensing to restrict participation in public tendering processes or the use of pre-qualification questionnaires.[46]

b. **Analysing collective levels of local authority and anchor spend in Oxfordshire:** With leadership from the County Council, procurement leads within the County, districts and anchor partners should be encouraged to analyse their procurement data and identify their influenceable spend – in other words money that is currently being spent on goods and services that could in theory be spent with alternative local and more socially productive suppliers, such as triple bottom line SMEs and social enterprises. This would allow for a county-wide understanding of local authority and anchor spend and pave the ground for interventions to increase spending with alternative supply chains. The community wealth building progressive procurement baseline survey is a tool that can be used to better understand procurement practices across Oxfordshire.[47] By circulating and analysing annually, this could be a baseline that the County Council, anchor institution partners and local authorities can use to strengthen their progressive procurement agendas, identifying any gaps and how they can be addressed.

c. **Support the development of locally relevant TOMs:** OCC collaborates with the Social Value Portal, utilising the national TOMs framework. However,

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[46] CLES (2020). Restoring public values: the role of public procurement. Link.
[47] A spend analysis methodology can be found at: CLES: Making Spend Matter. Link.

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challenges within the TOMs framework have been identified in the consultation process, particularly for the VCSE sector and SMEs. There was a proposal raised for a new tailored framework to measure social value, which goes beyond national TOMs to capture the value added to the local economy and the concept of plural ownership, recognising the greater value that generative business forms capture for the local economy. This should be revisited, supported, and used by the County.

d. **Engage potential suppliers:** Greater engagement with potential suppliers to foster confidence and dispel misconceptions about social value, consultation stakeholders also suggested hosting events at the pre-market stage of the procurement process, engaging SMEs and VCSE organisations in particular. One noted that *"the overarching sentiment is that social value should transcend being merely an obligation; rather, it should be embraced as a positive force for societal benefit".* As per the examples of emerging practice in section 2, this could also involve economic development officers engaging with local SMEs to make them aware of the goods and services pipeline, with a view to more of their supply chains being delivered by these local businesses. This could also be an opportunity to encourage the adoption of the living wage, as well as initiating discussions around succession planning, to potentially transition to worker ownership if business owners are reaching retirement age. The employee ownership sector has doubled since 2020,[48] and the Employee Ownership Association provides materials that could be used by councils to support the transition of local businesses.

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[48] Employee Ownership Association: What the Evidence Tells Us. Link.

3. Land and Property

Progress to Date

There are a number of activities already in motion that are leveraging land and property to drive forward progressive economic development practice.

Our consultations illuminated various perspectives on the future use of land in the County, spanning from housing and employment to infrastructure, community use, green space, nature recovery, and renewable energy. Suggestions range from specific site proposals to broader ideas and opportunities. There was expressed support for sustainable and inclusive development, emphasising accessibility via public transport, and amenities within walking or cycling distance. Additionally, stakeholders highlighted the importance of environmentally friendly building methods and technologies that contribute to net-zero emissions and resilient infrastructure.

Active Community Land Trusts (CLTs)

Currently, the VCSE sector is driving active CLTs, empowering communities to take control of assets. These organisations are engaging in various projects aimed at identifying publicly owned brownfield sites and constructing permanently affordable housing across the County, with support from Oxford City Council. Notably, there are ongoing initiatives at Crofts Court and Blackbird Leys, areas characterised by relatively high levels of multiple deprivation. As a result of these efforts, from eight affordable homes for rent have been fully developed in a high-value area suffering from a severe shortage of affordable housing.[49]

Affordable Workspace for Local Business

"A lot of businesses say that access to space is a real challenge… there is a need for the County Council and its anchors to do more to provide space."

The limited availability of employment space in Oxfordshire has presented significant challenges for local businesses striving to meet their operational needs and growth aspirations[50]. Recognising this issue, OxLEP has played a pivotal role in supporting the development of affordable workspace for local socially trading businesses. In 2022, the announcement of the opening of 'Community Works' marked a significant milestone in this endeavour.[51] This initiative utilises underutilised sites with the aim of revitalising the local economy and fostering more inclusive and resilient local communities.[52]

Community Asset Transfers (CAT)

As part of the County Council's efforts to foster thriving communities, groups are increasingly empowered to occupy, manage, and take ownership of shared assets in their localities, thereby

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[49] Ibid.
[50] OxLEP. (2023). Strategic Economic Plan 2023-33. Link.
[51] OxLEP News: Oxford community workspace officially opens as new spaces are secured through OxLEP-backed 'Meanwhile in Oxfordshire' programme. Link.
[52] Ibid.

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supporting regeneration efforts. Since 2011, over 80 buildings have been transferred to community and voluntary groups at community rent rates, reflecting a commitment to grassroots initiatives and community-driven development.[53]

"The council is empowering groups to take ownership of unused buildings in their locality and support regeneration in their respective areas."

The existing CAT policy, introduced in 2012 and revised in 2016 and further amended in 2019 and revised in 2023, stipulates that all transfers are *"limited to a use which is for the benefit of the local community,"* thereby preventing the transfer of assets to organisations that may seek to extract wealth from the community through rents or other means. However, stakeholders in our consultations noted a concerning trend:

"A lot of community groups have hit financial difficulty and can't invest in the building they have acquired through CAT and have to return the building to the council; this doesn't benefit the community."

Furthermore, stakeholders maintained that *"the topic of asset transfer, particularly within local authorities, is often not well understood, leading to challenges in its effective implementation."* To address this knowledge gap and promote greater understanding and collaboration, stakeholders suggested a roundtable event focused specifically on CAT policies. The primary objective would be to facilitate discussions, share insights and experiences, and collectively explore strategies to enhance the effectiveness of asset transfer initiatives.

Stakeholders also emphasised the need for the County Council to offer further support by providing advice and acting as a conduit, connecting community and voluntary groups with bespoke business support and sources of finance to alleviate the financial burden of maintaining assets.

"The County Council could take a more strategic role where these assets are mobilised towards social economy aims."

Additionally, there was interest in enhancing the existing policy to require asset-purchasing groups to demonstrate community benefit through the introduction of an additionality criteria. This could include, for example, requiring organisations to submit business registration and organisational proposals outlining their contributions to local inclusive employment or affordable housing initiatives.

Non-Alignment on Local Plans

Recognising the necessity for a more coordinated approach, OxLEP has played a pivotal role in supporting projects like Make Space Oxford, securing funding, and contributing to Oxfordshire's social and economic objectives. However, challenges persist due to the split of planning, economic, social and community functions across authorities within the geography. As district councils develop their local plans, a district-first approach necessarily prevails, driven by housing complexities arising from boundaries and pressures. Breaking this cycle of economic growth and

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[53] Oxfordshire County Council: Community Assets. Link.

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housing pressures becomes a central challenge, underscoring the need for cohesive, strategic planning, and collaboration among local authorities.

Throughout our consultations, there was a recognition that local planning systems can facilitate the progressive use of land and assets by placing conditions on private developers to contribute to community wealth-building objectives. This could entail section 106 requirements to contribute to local employment and skills or obligations for developers to support local supply chains. Stakeholders noted a growing recognition and appetite among private developers to align with local economic priorities, integrating these considerations into their ESG goals beyond profit-driven motives:

"Increasingly within the private sector world, non-financial metrics are beginning to be more prominent."

However, this acknowledgment comes with the caveat that local planning remains the statutory function of district councils, which, thus far, operate in different directions. Stakeholders highlighted that within local plan development, district councils primarily focus on housing development, driven by requirements of the national planning framework, with the risk of social and community infrastructure being under prioritised. Therefore, there is an appetite for the County Council, with its statutory Public Health and Social Care function and its new economic planning role, to act as an advocate and convener, working with districts to align their objectives within the broader local plans, ensuring a more holistic and inclusive approach to development.

Summary

Consultations on land and property use in Oxfordshire reveal a multifaceted approach focused on economic development and community wellbeing. While initiatives like Community Land Trusts (CLTs) and 'Community Works' have made strides in addressing affordable housing shortages and providing affordable workspace for local businesses, there remains room for expansion to maximise their impact. One notable challenge is the need for greater financial incentives and resources to support these initiatives effectively. Additionally, Community Asset Transfers (CAT) face hurdles that necessitate improved support mechanisms to facilitate their success. The absence of a unified local plan further complicates strategic planning efforts, although there is potential for private developers to align with local priorities. To address these issues, greater coordination among stakeholders and local authorities is imperative to ensure that land use serves collective goals effectively.

Key Actions

3) **Deepen the progressive land use and disposal across the Oxfordshire footprint:** In terms of land and property disposal, this is about viewing these assets as more than just a commodity. The consultations raised the issue of lack of access to affordable space as a barrier for socially trading organisations and stakeholders suggested that the council and other anchor organisations could support them, by using underused spaces.

   a. **Use surplus public land to support affordable housing and business space:** Despite the pressure to sell-off surplus assets to maximise financial return, the County Council could take lead in encouraging all anchor partners

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to consider whether any surplus land and property could in the first instance be used to support the development of affordable housing or the provision of affordable business space. As per the example in section 2, the Council could consider the feasibility of establishing a wholly owned council-company to build more affordable housing.

b. **Develop a community wealth building land use strategy for the county to influence local plans and anchor institution policy and practice relating to land use and disposal:** The upcoming refresh of the district local plans provides an opportunity to incorporate community wealth building principles into land development. While local planning takes a "district first" approach on Oxfordshire, there can be a role for the County to influence local plans and land use practice through the development of a community wealth building land use strategy. This strategy can identify the gaps in progressive land and property use while advocating for community wealth building approaches to be taken across political and institutional boundaries.

Within this strategy, the County Council could also utilise the expertise and institutional knowledge of the LEP to provide data, ensuring that progressive approaches to planning, such as utilising S106 to drive local employment or affordable housing and workspace, is supported by economic evidence.

c. **Review the property and asset portfolio of the County Council to inform community asset transfers:** The County Council currently has their own community asset transfer policy which has seen over 80 assets transferred into community use. Stakeholders throughout the consultations have suggested that this policy could be adapted to include additionality criteria that aims to ensure assets are being transferred to organisations that are supporting progressive local economic development. This is particularly important at a time when Westminster are loosening budget rules for councils, to be able to dispose of assets in order to fund front-line services. However, much of the property and assets held by the Council are deemed not appropriate for transfer and the policy remains under-utilised. Therefore, the County Council should conduct a review of properties and assets available for transfer alongside the VCSE sector to assess the property needs of the local social economy organisations and SMEs.

Furthermore, once any asset is in the process of transfer, the County could act as a conduit to connect organisations who are taking the asset with the business support required to bring the asset into use and avoid financial stress.

4. Employment and Skills

Progress to Date

"Oxfordshire is dedicated to inclusive recruitment. However, there are resource challenges. While outreach initiatives for apprenticeships are underway, there is a lack of specific targeting for populations... the current approach is more general."

Oxfordshire is committed to inclusive recruitment, although challenges persist due to resource constraints. While outreach initiatives are underway, there's a need for more targeted approaches to reach specific populations. Consultations underscored the importance of aligning recruitment processes with inclusive employment goals, highlighting the necessity for a more coordinated and collaborative approach to enhance economic inclusivity across the County.

Anchor Institution Commitments

Our consultations revealed several positive initiatives, reflecting a collective commitment to fostering inclusivity through fair employment and targeted recruitment. **The Oxford University Hospitals NHS Foundation Trust (OUH) stands out in this regard, engaging with the local community and refining recruitment and employment practices.** A crucial aspect of this exploration revolves around aligning recruitment practices with the commitment to building a diverse and inclusive workforce. As an anchor institution with extensive local and national connections, OUH has a unique opportunity to lead and influence the Equality, Diversity, and Inclusion (EDI) agenda. The trust aims to benchmark itself against peers, emphasising inclusive practices and prioritising outcomes such as being recognised as an inclusive employer and care provider. OUH's commitment to EDI is evident through the implementation of key standards, including the Workforce Race Equality Standard (WRES), Workforce Disability Equality Standard (WDES), and Gender Pay Gap (GPG) reporting. These standards, along with annual reports and action plans, underscore OUH's commitment to transparency and accountability in creating a more inclusive workplace. Positive steps have been taken in recruitment for disabled individuals, including the piloting of easy-read job applications and supported traineeships. Additionally, improvements in the recruitment process aim to mitigate bias, with requirements for a minimum number of short listers and standardised job application structures. These initiatives reflect a deliberate effort to create an environment that attracts and retains a diverse range of talent. Despite the progress, OUH acknowledges the ongoing nature of this transformation, *"recognising challenges posed by the organisation's size, traditional mindset, and established structures."* This acknowledgment reflects OUH's commitment to continuous improvement and understanding the need for sustained efforts to achieve lasting change.

Pre-Employment Support Provision

Another notable initiative is the 'Social Contract Programme', launched in 2022 and funded by the government's Contain Outbreak Management Fund via Oxfordshire County Council. This programme, provisionally set to continue until August 1, 2024, with a budget of £1.7 million, addresses the needs of Oxfordshire communities most affected by the Covid-19 pandemic. It aims to mitigate the impacts on health and wellbeing related to unemployment or barriers to

employment, education, and training. A crucial element of the programme is the emphasis on access to quality employment supported by appropriate skills and training opportunities, recognising their role in enhancing health and wellbeing outcomes for individuals and families. Key focuses include raising awareness of Apprenticeship Levy underspend in Oxfordshire, creating a pipeline of Levy payers and SME's ready to benefit from pledged funding, and promoting initiatives like the Oxfordshire Apprenticeship Grant Scheme and the Oxfordshire Apprenticeship Awards.

The collaboration between Oxford Hub and Activate Learning, has given rise to the Parent Power programme. Centred on fostering parent wellbeing and support networks, the programme envisions a community where parents and their children thrive together. By emphasising three key outcomes—ensuring good emotional wellbeing and health for parents, cultivating strong community support networks, and fostering better relationships with schools—Parent Power aims to create positive ripple effects for children. The programme offers practical learning sessions, including English classes, theory test support groups, and school readiness sessions, providing spaces for skill development and community connection. Additionally, Parent Power provides leadership development opportunities, empowering parents to contribute actively to broader strategies and policies, including the redesign of the Early Help Strategy at Oxfordshire County Council. As Parent Power evolves into its second version, a key focus is on reintroducing parents and adults to training through activities such as one-day training courses. This approach is designed to boost confidence and encourage participants to explore higher-quality job opportunities, aligning with the overarching goal of empowering parents through continuous learning.

This infrastructure and experience mean that Oxfordshire is well placed to support individuals within communities of need. However, amidst these positive actions, challenges persist. As one stakeholder put it:

"We need a different recruitment approach by removing barriers, inviting people for a chat, and adopting a more personalised strategy that considers the perspectives and environments of individuals."

During consultations, a stakeholder with prior experience managing an employment support programme at the Oxford City Council highlighted the specific challenges faced by single mothers with children who have never worked. This underscored the importance of providing tailored support and flexibility. They advocated for prioritising initiatives like job fairs in community centres to address the unique needs of this demographic. This approach aims for a double win by becoming more targeted and offering bespoke support directly in communities.

Meeting Employment Demand

Addressing employment demand remains a critical challenge in Oxfordshire, despite existing programmes aimed at supporting employability skills. One stakeholder highlighted that *"out of roughly 9,700 Universal Credit claimants across the County, 6,500 are considered the hardest to reach and furthest from the labour market."* Despite ongoing interventions, this number has shown no significant improvement.

The social care sector in Oxfordshire presents its own set of challenges, being the largest element of capital expenditure. The sector comprises a mix of numerous small enterprises, including

around 150 providers for homecare and 170 care homes in the county. However, *"despite this diversity, the sector faces significant employment challenges, marked by substantial vacancies."*

Recruitment difficulties at the local level have necessitated active overseas recruitment, highlighting the need to attract local talent to meet the demands of the sector. The complexity of the social care landscape adds pressure to ensure timely access to appropriate care, further exacerbating recruitment challenges. Limited funding remains a significant barrier, particularly in offering competitive wages in the social care sector.

Summary

In summary, stakeholders have identified significant anchor institution vacancies in Oxfordshire, highlighting opportunities for collaboration with the County Council to promote diverse and inclusive recruitment strategies. Leveraging existing initiatives and the HR network led by the Oxfordshire Inclusive Economy Partnership, a coordinated effort is recommended.

Key steps include mapping employment profiles, auditing support interventions, and designing targeted pathways for those facing barriers. Exploring resources like the Shared Prosperity Fund, as seen in Fife Council's success, could further enhance employment programmes. These actions aim to create a more inclusive workforce and ensure opportunities for all community members.

Key Actions

4) **Implement lessons learned from the social contract programme and ensure ongoing funding.** The County Council should explore what is to replace the social contract programme once it ends in December 2024. This could include pre-employment support delivered through the social contract programme, ending at the end of 2024, and further supported by existing HR network. Beyond the social contract programme's end, further support could be delivered by VCSE organisations, like Aspire with further funding sought through the ICB, with a particular focus on recruitment into the NHS as a remedy to economic determinants of health. Additional funding could also be sought from round three of the Shared Prosperity Fund. Consideration should be given to the extent to which pre-employment support is directly linked to employment demand within the County's anchor institutions – linked to recommendation five below.

5) **Target Employment among the County's anchor institutions:** Emulating a scheme like ICan, the County could utilise their convening power, to encourage anchors to direct their employment opportunities towards under-served communities based within their locality, drawing on the employment support interventions that are currently on offer and potentially looking to commission new support if needed. Based on our consultations, both the NHS and Universities could be potential partners here. Given the challenges around fulfilling roles within social care, the Council could also look to engage social care providers in this process. An ICAN based model could be based on the following actions:

   a. **Encourage Oxfordshire's anchor institutions to map employment profiles:** Use this exercise to identify any deprived postcodes where

anchors are employing relatively few people. While the OIEP have identified target groups, the Community Research Network could be used to help locate the communities in need of anchor institution employment.

b. **Identify a series of suitable job roles and link this to pre-employment support.** Depending on the findings, additional employment support may be required. **Further action to target employment could include:**

      i.   Examining recruitment practices and job specifications to maximise accessibility for target groups.

      ii.   Advertising all anchor institution vacancies on a single portal, with entry level administration person specifications aligned.

      iii.   Outreach work whereby the County Council and anchor partners work with the VCSE sector on the ground to target existing vacancies towards specific communities.

5. Social Economy

Progress to Date

In Oxfordshire, concerted efforts are underway to cultivate a vibrant social economy, marked by collaborative initiatives and innovative partnerships.

The diverse network of Community Action Groups (CAGs) exemplifies grassroots activism in action, with over 100 groups mobilising communities to address a wide range of issues, from waste management to digital inclusion. Through initiatives like Libraries of Things and Repair Cafés, these groups promote resourcefulness, environmental sustainability, and social cohesion, enriching the fabric of community life.

District councils for example, have proactively aligned with third-sector organisations, offering essential services such as cooperative development support, training programmes, and peer mentoring.

Kellogg College at **Oxford University hosts the Oxford Centre for Mutual and Co-owned Business** (MCOB), responding to the growing significance of mutual and co-owned sectors in the UK and global economy. Supported by organisations like Mutuo and the Employee Ownership Association, MCOB is dedicated to leading research, offering professional development programmes, and facilitating cross-sectoral dialogue to advance the understanding and practice of ethical, community-centric business models within and beyond Oxford.

Additionally, **'Owned by Oxford'** is leading efforts to **establish a community-led economy within the City**. This partnership of grassroots community enterprises and infrastructure projects collaborates with larger anchor institutions to innovate new ideas and identify opportunities for supporting local social trading businesses through procurement.

The **Community Recovery Network** (CRN), established in 2023, **plays a pivotal role in forging alliances between the VCSE sector and local communities to develop nature-centric recovery strategies, particularly in high-deprivation areas**. This initiative aims to build resilience, enhance social cohesion, and promote sustainable development practices prioritising the wellbeing of all residents. Through direct funding and capacity-building efforts, the CRN supports the development of local nature recovery strategies, emphasising public involvement, especially from seldom-heard voices in deprived communities. It is adept at nurturing early-stage ideas and collaborating with communities to bring them to fruition.

Challenges and Opportunities in Advancing Oxfordshire's Social Economy

Despite notable progress, Oxfordshire's social economy faces persistent challenges. Consultations revealed the need for more tailored business support specifically designed to meet the unique needs of the VCSE sector:

"The LEP operates a growth hub and a business support team, and we've collaborated with them to secure funds for the VCSE sector, particularly social enterprises, over several years. However, it's worth

noting that while the LEP aims to cover a broad spectrum, the VCSE sector benefits from specialised expertise from organisations like Owned by Oxford, Aspire, and Cooperative Futures. These organisations are more localised and can provide robust support. While we seek additional support, it's crucial that it is distinct from mainstream business assistance."

Collaborations with localised organisations such as Owned by Oxford, Aspire, and Cooperative Futures have proven beneficial, offering specialised expertise and tailored support. However, consultations highlighted the necessity for meaningful engagement with the VCSE sector beyond mere lip service:

"When it comes to supporting businesses, it's crucial to partner with local organisations deeply connected to the communities we aim to help. Many in disadvantaged communities might not know about available support or face challenges in accessing it. We've been exploring funding business development roles in community organisations, like community banks, offering a flexible approach."

Consultations have revealed fatigue within the VCSE sector and communities due to constant engagement without meaningful outcomes. To mitigate this, it's essential for anchor institutions to avoid duplicating efforts in community engagement and utilise existing networks such as the Community Research Network for engagement with VCSE sector professionals and residents directly:

"Mechanisms like the Community Research Network, involving relevant communities and VCSE sector representatives, exist for this purpose. Utilising these existing networks is essential to avoid overwhelming the VCSE sector and to make coordinated and joined-up efforts, ensuring our requests to both them and the community are sensible."

Moreover, the absence of sufficient early-stage capital for emerging social economy businesses poses a significant challenge. Stakeholders have proposed the exploration of creating a community-controlled investment fund, similar to the successful model of Kindred in Liverpool (as outlined in section 2), to overcome this shortfall. In this endeavour, anchor institutions are seen as instrumental in both seeding and supporting the establishment of such a fund, ensuring its effectiveness and sustainability. This collaborative effort would not only address the pressing need for financial resources but also foster innovation and growth within Oxfordshire's social economy ecosystem.

Furthermore, consultations highlighted the vital role of strong relationships between anchor institutions and the VCSE sector beyond financial support. These relationships serve as crucial enablers of the social economy's capacity, fostering collaboration, knowledge exchange, and resource sharing. Stakeholders emphasised the importance of anchor institutions exploring opportunities for co-working spaces and shared resources, extending beyond physical spaces to include expertise in areas such as business support, legal guidance, and HR advice. This approach could bridge the gap where traditional funding may be unavailable, ensuring the sustained growth and resilience of the social economy sector in Oxfordshire.

Summary

In summary, consultations highlighted the need to address challenges facing Oxfordshire's social economy. Tailored business support, exploring a community-controlled investment fund, and fostering strong relationships between anchor institutions and the VCSE sector emerged as key

priorities. By implementing strategic solutions and fostering collaboration, Oxfordshire can create opportunities for sustainable growth and prosperity within its social economy ecosystem.

Key Actions

6) **Consider the utility of the current business support offer:** Our consultations have suggested a disparity of opinion regarding the appropriateness of the business support offer in advancing community wealth building practice in Oxfordshire.

   a. **Audit business support alongside the VCSE sector to better understand the appropriateness and availability of the business support offer in Oxfordshire:** Consultations further suggested that existing business support offer was fragmented and there was a disagreement on the suitability of some existing offers for bespoke social economy support. Therefore, we recommend an audit of existing business support offerings throughout Oxfordshire.

   b. **Following an audit, consider additional support and available funding streams:** Additionally, consultations highlighted that current SPF funds may not be sufficient, but future SPF funding could provide an opportunity to finance a bespoke business support offer to support social economy organisations. Based on emerging practice highlighted in section two, Oxfordshire could look to Greater Manchester to emulate its Inclusive Ownership Platform, which will provide bespoke support for alternative modes of ownership and is funded via shared prosperity fund money, or to Liverpool City Region to investigate the feasibility of adopting the Kindred model. A new social economy support offer should be focused on enabling social economy businesses to start and grow by providing training and support. It could facilitate peer connectivity to help disseminate best practice. It could also be used to promote social economy products and services to other businesses and public bodies across the County.

6. Conclusion and Next Steps

As local economies such as those in Oxfordshire attempt to navigate the multiple crisis that are being faced by people and communities, the County Council could play a pivotal role in the pursuit of more inclusive local economies.

As explained in section two, the evidence is starting to suggest that community wealth building can provide an effective model for economic development that leads to substantial health benefits. What is more, and as this framework for action demonstrates, the County Council and its local authority and anchor partners have a number of key assets at their disposal that can be deployed in a more purposeful way to develop a community wealth building approach.

To this end then, the framework for action does offer something of a blueprint as to how the County and partners can start to fulfil its ambitions around social and economic development – a blueprint that is about rewiring the system, rather than tinkering around the edges.

We strongly recommend that the County Council and partners move to operationalise this action plan as soon as possible. There is not necessarily a complete logical order as to how County should approach this task and there may be quick wins and low hanging fruit that could be immediately addressed in some areas.

In conclusion, however, we would recommend that finessing the vision is fundamental and should be addressed as a matter of priority. The County Council has made a great start here but as we have made clear above, it cannot be agnostic about the kind of economic growth it will support going forward. Growth for growth's sake does not trickle down and has fuelled the very social, economic and environmental challenges we must now address.

Start small if needs be but embrace the substantive changes to practice that will be required to deliver a truly inclusive economy across the County.

7. Appendix – List of stakeholders

Name	Role	Organisation
Robin Rogers	Director Partnerships and Delivery	Oxfordshire County Council
Rosie Rowe	Head of Healthy Place Shaping	Oxfordshire County Council
John Pearce	Adults Commissioning Manager	Oxfordshire County Council
David Munday	Deputy Director of Public Health	Oxfordshire County Council
Melissa Sage	Head of Procurement	Oxfordshire County Council
Vic Kurzeja	Head of Property	Oxfordshire County Council
Chloe Taylor	Head of Economy	Oxfordshire County Council
Sean Collins	Pensions Manager	Oxfordshire County Council
Teresa Kirkham	Head of Environment and Circular Economy	Oxfordshire County Council
Michael Smedley	Head of Estates, Assets and Investments	Oxfordshire County Council
Paul Wilding	Cost of Living Programme Manager	Oxfordshire County Council
Elaine North	Education, Employment & Training Manager	Oxfordshire County Council

Sam Lees	HR Lead for Inclusive Employment	Oxfordshire County Council
Fulya Markham	Strategy Lead – Age Well, Live Well	Oxfordshire County Council
Emily Schofield	Head of Strategy	Oxfordshire County Council
Jessie Dobson	Partnership Youth Development Manager	Oxfordshire County Council
Martin Goff	Head of Access to Learning	Oxfordshire County Council
Charles Butters	Interim Senior Strategic Assets Officer	Oxfordshire County Council
Hannah Goodlad	Operations Manager – Assets & Investments	Oxfordshire County Council
Will Gardner	Employment Support Manager – Print Finishers	Oxfordshire County Council
Karen Hopwood	Head of Organisational Development	Oxfordshire County Council
Becky Spencer	Social Value Manager	Oxfordshire County Council
Rose Rolle-Rowan	Lead Commissioner for Strategy Innovation in HESC	Oxfordshire County Council
Wider public sector		
Richard Byard	Director of Business Development	OxLEP
Lyn Davies	Director of Corporate Services	OxLEP
Emma Coles	Oxfordshire Inclusive Economy Partnership (OIEP) Programme Manager	Oxford City Council (OIEP)

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Jeremy Long	Oxfordshire Inclusive Economy Partnership (OIEP) Co-Chair	OIEP and Oxford University
Simon Grove-White	Principle Economic Development Officer	Oxford City Council
Clayton Lavallin	Economic Development Lead	Oxford City Council
Mish Tullar	Head of Strategy	Oxford City Council
Nick King	Economic Development Manager	South and Vale District Councils
Ben Watson	Exchequer and Procurement Lead	South and Vale District Councils
Steven Newman	Economic Development Officer	Cherwell District Council
Richard Fowles	Procurement Lead	Thames Valley Police
Claire Widdison	Head of Strategy	Thames Valley Police
James Gilpin	Oxfordshire Employer Engagement Manager	DWP
Health		
Chris Wright	Oxfordshire Partnerships Lead	ICB
Dan Leveson	Place Director for Oxfordshire, Buckinghamshire, Berkshire West ICB	ICB
Steve Goldensmith	BOB ICS Head of Prevention and Health Inequalities	ICB

Sam Shepherd	Interim Director of Strategy and Partnerships	OUH
Nileema Patel	Public Health Registrar	OUH
Wendy Cheeseman	Head of Estates Sustainability	OUH
Zheng Yaolin	Public Health Registrar	OUH
Helen Vincent	Strategic Delivery Lead	Oxford Health Foundation Trust
John Upham	Sustainability Manager	Oxford Health Foundation Trust

Education

Dr Helen Carstairs	Head of Regional Engagement and Knowledge Exchange	Oxford University
Alex Betts	Local and Global Engagement Officer	Oxford University
Jo Sibbald	Procurement Lead	Oxford University
Giles Orr	Head of Business and External Engagement	Oxford Brookes University
Cat Marin	Group Director	Activate Learning
Rebecca Iley	Director of Employability	Activate Learning
Sarah Separovic	HR Director	River Learning Trust
Susie Morrissey	Transformation Director	River Learning Trust

Caroline Isaac-Hamdan	Employability and Partnerships Lead	Adviza

Charity, social enterprise and third sector

Grant Hayward	Operations and Enterprise Support Manager	OSEP
Anais Bozetine	CWB Manager	Owned By Oxford / CAG
Emily Lewis-Edwards	CEO	Community First Oxfordshire
Zoe Springings	CEO	Oxfordshire Community Foundation
Amy Lockwood	CEO	Oxford Hub
Anthony Leonard	Operations Director	SOFEA
Andy Attwood	Site Director	SOFEA
Fiona Steel	CEO	Good Food Oxfordshire

Other/local businesses

Megan Carter	People Director	Blenheim Palace
Veronica Reynolds	Sustainability and Community Manager	Milton Park
Maria Warner	Procurement Lead	ODS Group
Natalie Snowden	Procurement Lead	ODS
Rosabella Robertson	Net Zero Engagement Specialist	SSEN

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| Jodie McNamara | Director | ARC Campus |

Centre for Local Economic Strategies

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Social Value – A Statement of Definition and Ambition

The concept of social value considers how an organisation can add or detract to the community and environment through the *way* they act, not just through *what* they deliver. In the UK public sector context, social value is often narrowly defined as set the out in Social Value Act 2012, which deals with additional value that can be delivered through procurement. The County Council is ambitious to consider how it can deliver social value more broadly across its operations. This statement sets out a definition for social value that looks beyond what is delivered through the existing procurement policy, acknowledging that the principles of social value can be translated into other areas of economic function within the council such as asset management, employment and market shaping. This statement sets out an ambition to encourage a more thoughtful consideration of how these economic functions can have an impact on residents and local organisations, and how, where feasible, additional positive impact can be leveraged.

The Social Value Act and procurement
The Social Value Act requires public sector organisations to consider the economic, social and environmental well-being of an area when they commission and procure services. In 2022 Oxfordshire County Council approved a Social Value Policy which outlines how the council is implementing the 2012 Social Value Act. For tenders above the £100,000 threshold, suppliers are required to demonstrate how their economic activities in Oxfordshire will contribute positively to local people or the local environment. When designing the Social Value Policy, the council was able to prioritise a set of categories for the types of social value activities that suppliers can commit to. The Social Value Policy acknowledges the power and potential held in how the council conducts its procurement and commissioning functions, by expanding what is meant by 'value' when considering how tenders are awarded. Since launching the social value portal in March 2022, the council has delivered £3,689,547 of social value (as of April 2024), which is a monetary approximation for the 'value' of the additional social good that suppliers have committed to. The social value policy has been a great success, and demonstrated that it is possible to think differently about the impact that the council's economic functions have on our place. In line with our ambition to become a place-shaper of choice, it is important that the council is considering the economic, social and environmental well-being of Oxfordshire in all of our work.

This document outlines how learning can be applied from the Social Value Policy to other areas of the council's economic function that sit outside of the legal definition of 'social value' which applies specifically to procurements above the £100,000 threshold.

What do we mean by 'social value beyond procurement'?
This statement considers how we can go beyond the social value procurement policy, and ensure social value is considered in other areas of economic function, meaning the mechanisms that enable the council to deliver services, for example:

- Purchasing goods and services that fall below the Social Value threshold and identifying opportunities to build social value into contract specifications and tendering design

- Managing our assets
- Inclusive employment efforts
- Working with partners to maximise co-benefits and access to funding
- Market shaping and support for local businesses
- Influencing through partnerships and leading by example for improved social, economic and environmental outcomes in Oxfordshire

The Social Value Act provides a specific requirement for assessing social value over and above the main specifications of the contract. Similar frameworks are not in place for other areas of social value. In many cases, legislation requires the council to seek best value, narrowly defined, or otherwise sets strict requirements on how the council can act, for example in employment law. Nevertheless, there are significant opportunities to advance the Council's agreed priorities through broader consideration of Social Value in the way it operates.

OCC Draft Social Value Priorities

The County Council's Strategic Plan will inform what the Council will seek to achieve through social value. The council will produce further guidance and toolkits that will set out examples of what good looks like in terms of delivering social value in the way services are designed and delivered. Furthermore, this guidance will give an indication of how the council can measure progress against social value ambitions, in qualitative and quantitative terms.

The draft social value outcomes set out below focus on ways of working that promote asset-based community development, building partnerships that tackle inequalities and bringing investment and opportunities back to local people. These aim to align with the TOMs in the existing policy but made relevant beyond procurement.

Theme	OCC Strategic Plan Aims	Social Value Outcomes
Economic	Create opportunities for children and young people to reach their full potential	Improved employability of young people
	Work with local businesses and partners for environmental, economic and social benefit	New and improved skills for local people
		More local people in employment
		Crime and anti-social behaviour is reduced
		More investment and opportunities for local businesses, charities or socially-minded enterprises
		Support local businesses to embed social value and sustainability into supply chains
		Engage with our communities, develop strong ties and collaborate on projects to improve the local area together
		Minimise the impacts of businesses on our current and future environment, promoting circular principles and delivering sustainable growth
	Tackle inequalities in Oxfordshire	More opportunities for disadvantaged people
		Increase and promote fair and equal pay and reduce pay gaps
Social	Prioritise health and wellbeing of residents	Improving staff wellbeing and mental health

		Addressing the causes of health inequalities
	Support carers and the social care system	Vulnerable people are helped to live independently
	Invest in an inclusive, integrated and sustainable transport network	Supporting access to active travel enablers such as bicycles or other equipment
		Support for public transport usage or infrastructure
	Play our part in a vibrant and participatory local democracy	Support for community-led or cooperatively owned business models that embed community power into our economic democracy
Environmental	Put action to address the climate emergency at the heart of our work	Carbon emissions are reduced
		Air pollution is reduced
		Resource efficiency and circular economy solutions are promoted
		Sustainable procurement is prioritised
	Preserve and improve access to nature and green spaces	Safeguarding the natural environment – protecting and enhancing the environment

Note: The social value outcomes listed serve as examples and are not exhaustive. Some outcomes will apply across multiple themes, and the Council would welcome social value contributions or collaborations that aren't listed above, but that do support progress towards the Council's key priorities.

A Community Wealth Building approach to social value

The council has recently concluded a piece of work to develop a set of independent recommendations that outline how we can develop an approach to economic activities and economic development function that is informed by Community Wealth Building (CWB). Community Wealth Building represents a broader based approach to economic development, aiming to reshape conventional economic systems to enhance the flow and wealth and opportunity for local residents and communities. CWB provides a framework around five key pillars of activity:

- Economic development
- Spending and procurement
- Land and property
- Employment and skills
- Social Economy

By strategically deploying financial resources, employment practices, and assets such as land and property, organisations such as OCC and our partners can significantly influence the prosperity and well-being of local communities. CWB is a broad approach, with social value being one of the key ways in which we can deliver our wider Community Wealth Building aspirations. CWB provides a helpful framing and healthy challenge for the council to understand the extent of our economic power, and how we can be leveraging maximum benefit from that power.

The council has identified some priority CWB actions for this year, and will be developing a strategy based on learning from delivering the actions planned for this year. Oxfordshire as a place has a strong base of community wealth building initiatives and opportunities with solid examples already delivering within the Council and among its partners. The draft action plan in development includes investment in training and resources that will support officers to learn from examples of 'doing things differently' that have brought mutual benefit to residents, the local economy and the council.

Definition and principles

To provide greater clarity for the organisation, and avoid confusion around technical and non-technical meanings, this document will provide definitions for social value in different contexts:

- **Social Value** - any additional economic, social or environmental benefit generated in any areas of activity carried out by OCC in the way it conducts business, rather than in the specific services it delivers

- **Social Value as defined in the Social Value Act -** additional economic, social or environmental benefit generated through the procurement of goods, works or services from the Council's suppliers and the supply chain as a direct requirement of the Social Value Policy and the Social Value Act 2012

Generating social value is not something that can easily be reduced to a set of processes that the council can follow, and to do so may limit the possibilities of what we can achieve. This definition statement does not, therefore, set out a specific methodology for generating social value. The generation of social value will complement the priorities of the council, as set in the corporate plan and the budget. Building wealth and resilience within communities sits at the heart of how the council operates, and is encapsulated in strategies such as the Oxfordshire Way. When talking about generating social value, the definition must accommodate for the diversity of opportunities that will require individualised approaches, led by the council and community partners involved. Officers will be supported by training to consider social value when designing how to deliver a service or project, as well as considering the elements required to achieve the necessary outcome.

Much of the council is already engaging in the creative thinking that can generate additional social value. The Delivering The Future Together (DTFT) values have started to empower the council with the confidence to do things differently. The council will develop guidance and training that will support colleagues to put this social value statement into practice. The principles outlined below will add strength to a developing culture of innovation at Oxfordshire County Council:

Open to collaboration and doing things differently
- Be open to taking opportunities to collaborate with local organisations where feasible, this might include creative thinking around opportunities and challenges.

- The council's ambitions to make Oxfordshire healthier, greener and fairer will only be achieved through collaboration as these objectives cannot be achieved by one service area, or independently of each other.

Balanced evaluation
- Any efforts to generate community value should be carefully considered, ensuring that any future impact on the council's budget, or on the sustainability of projects has been evaluated.
- This is part of taking responsibility for the decisions that the council makes and ensuring that our commitment to supporting additional community value doesn't have a negative impact on our ability to carry out statutory services.
- The council's new Commercial Strategy draws a strong link between innovation in revenue generation, and fulfilling our social and environmental ambitions for Oxfordshire

Trust and transparency
- It is essential to build trust into how we operate, not only between the council and community groups, but also within the council between colleagues.
- New ways of working that generate community value, or support communities to develop their own resilience are more iterative and messy meaning that all parties have to trust one another to enable the necessary flexibility.
- Sometimes the most effective role the council can take is not the leading role, and to trust that local communities have the expertise to shape the support they need.

Listening and learning
- When doing things differently and working in new ways, the council will make mistakes. We will need to be prepared to learn quickly and to change our approach in response to feedback.
- Officers will be encouraged to share learning from projects that have gone well, to increase the confidence of colleagues to also work in this way.
- Always learning also applies to listening and feedback – the council needs to listen to the experience and feedback of residents and partners and to use this a constructive criticism.
- This may be particularly relevant when considering the accessibility of some of our economic functions, for example employment, grant-making, procurement.

Strengths-based thinking
- Collaborations work more effectively when all participants are doing what they are good at. Strengths-based thinking encourages the council to consider how the strengths of local people and organisations can be incorporated into how we deliver services.
- This approach is central to the Oxfordshire Way and provides a methodology for reaching sustainable and positive solutions.

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Divisions Affected - ALL

PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

19 JULY 2024

LEP INTEGRATION UPDATE

Report by CHIEF EXECUTIVE

RECOMMENDATION

1.   **The Committee is RECOMMENDED to**

-       **NOTE** the report, raise any questions on its contents and **AGREE** any recommendations it wishes to make to Cabinet

Executive Summary

2.   This report provides an update following the integration of LEP functions into the county council on 1 April 2024. The report outlines the government guidance and the provides an overview of the three phased approach that the county council has taken to LEP transition – including an update on phase one that is now complete and phase two that is in progress.

Background

3.   Formally launched in March 2011, OxLEP Ltd was initially established as a partnership with the local authorities, businesses and education sector in the area, and was incorporated as a not-for-profit company limited by guarantee on 31 March 2015.

4.   Oxfordshire County Council acted as OxLEP's Accountable Body in respect of OxLEP Ltd's core funds and any additional central government funding received.

5.   In August 2023, government confirmed that from April 2024, the government's sponsorship and funding of LEPs will cease. The associated guidance states that the government expects the functions currently delivered by LEPs – namely, business representation, strategic economic planning, and the delivery of government programmes where directed – to be exercised by upper tier local authorities, where they are not already delivered by a combined authority. In Oxfordshire's case this means Oxfordshire County Council.

6.	In February 2024 Cabinet agreed that the council would become the controlling member of OxLEP Board exercising its membership functions through Cabinet. This change in control was agreed by the OxLEP Boad in March 2024 and came in to effect on 1 April 2024.

7.	The change in ownership formed the basis of the first phase of a three phased approach to LEP transition. These are:

Phase 1 – Transition (By 1 April 2024)
Phase 2 – Implementation (1 April – 30 September 2024)
Phase 3 – Establishment (1 October 2024 – 31 March 2025)

8.	The following sections of this report focuses on progress to date with LEP Transition.

Phase 1 – Transition

9.	During this phase, interim governance arrangements have been put in place, these have been agreed in consultation with the current LEP board, and establish Council control as per government guidance, demonstrating that the functions have moved to the County Council.

10.	As part of the transition the OxLEP Board adopted revised Articles of Association that took effect from the 1 April 2024. These changes gave effect to the Transfer of Functions and confirmed Sole Membership of the Company in favour of Oxfordshire County Council. The Articles of Association define specific Reserved Matters for the County Council which are the Appointment of Directors, Approval of Business Plan and associated Budget.

11.	Cabinet will be considering items under the Reserved Matters on 16 July relating to two board appointments to the OxLEP Board and noting the 2023/24 year end budget position of OxLEP.

12.	In March 2024 the Future Oxfordshire Partnership noted the approach to LEP Transition that saw Oxfordshire County Council become the controlling member of OxLEP from 1 April 2024. It was agreed with the FOP that a Memorandum of Understanding would be developed that set out the principles for future working arrangements. The draft MOU is to be considered by FOP In July.

13.	The changes to the OxLEP Board have been registered with Companies House and this phase of LEP transition is now complete.

Phase 2 – Implementation

14.	As noted above, government now expects strategic economic planning to be a function exercised by the county council, and that areas are to publish their (existing, new, or updated) economic strategy within six months of receiving funding.

15. In January 2023, OxLEP commissioned a refreshed Strategic Economic Plan for Oxfordshire and undertook an Independent Economic Review (IER). The refreshed SEP was published in December 2023 alongside a detailed evidence base.

16. Following the transfer of functions OxLEP is reviewing the SEP to ensure that it aligns with the government guidance published in December 2023 emerging national policy, and with priorities of the County Council – including emerging strategy around community wealth building and findings from the doughnut economics commission. OxLEP will also be engaging with partners over the summer to ensure whole system input as part of the review.

17. Officers will continue to engage with Members in relation to the development of a revised economic strategy and this will be presented to Cabinet later in 2024/25.

Business Plan

18. Prior to becoming a county council company OxLEP produced a Corporate Plan that was approved by OxLEP Board. This current Corporate Plan covers 2022-24 and describes strategically the activities the LEP plan to coordinate, support, and deliver over the period to support Oxfordshire's economic recovery and addressing the key challenges that the covid pandemic exposed. It also contains an overview of the LEP's Key Performance Indicators.

19. While many of the core themes of the Corporate Plan remain relevant, the plan has dated and no longer reflects the current delivery priorities of OxLEP. As such, over the summer a revised Business Plan is being developed as part of the transition process and will be brought to Cabinet for approval.

Governance

20. As noted above the County Council is now the sole member of OxLEP Ltd. The company member function will be exercised by Cabinet during the implementation phase. However, this function may be delegated to an individual cabinet member, sub-committee or officer in future, following a review of the mechanisms through which the County Council exercises governance of its entities and the future governance structure of the LEP itself.

21. OxLEP is set up as a company limited by guarantee, this means that it has a 'member' rather than 'shareholder' structure. The County Council needs to consider how it exercises control of the company and how oversight will be undertaken. Best practice guidance from Local Partnerships has been considered and while aimed primarily at Local Authority Trading Companies with a shareholder structure, provides a model that can be adapted for companies limited by guarantee. This guidance has helped to inform the initial principles which are explored in the following paragraphs of this report. However, more work needs to take place during the transition phase to build on these principles.

22.   The role of the member includes:

    a. Oversight of any decisions that can only be made by the member, rather than left to the entity (known as 'reserved matters')
    b. The necessary oversight from the member's perspective that the parameters, policies and boundaries that the council has established are being adhered to
    c. A mechanism to communicate the member's views to the entity

23.   In addition, there should be evidence that the individual undertaking the member role is provided with suitable training and support commensurate with the role and is independent of the company. This responsibility may be delegated to a committee rather than an individual. If this is the case, there must be a terms of reference drawn up and a suitable cohort of elected members identified to sit on the committee.

24.   Further work will be undertaken on the governance arrangements during the implementation phase and brought back to the Audit & Governance Committee and to Performance and Corporate Services Overview Scrutiny Committee for consideration.

Phase 3 – Establishment

25.   Following the development of a new medium-long term business plan during the implementation phase, we would expect revised operating model, structure and governance to be fully implemented during the phase 3. The revised links and interactions with wider economic development resources within the Oxfordshire system will also be reviewed.

26.   This work will commence in October 2024 and is expected to be completed by March 2025.

Corporate Policies and Priorities

27.   LEP transition aligns with the vision set out in the County Council's Strategic Plan to lead positive change by working in partnership to make Oxfordshire a greener, fairer and healthier county. It also supports the priorities of:

    •   Put action to address the climate emergency at the heart of our work
    •   Tackle inequalities in Oxfordshire
    •   Invest in an inclusive, integrated and sustainable transport network
    •   Create opportunities for children and young people to reach their full potential
    •   Work with local businesses and partners for environmental, economic and social benefit

Financial Implications

28.   Oxfordshire County Council is the accountable body for OxLEP Ltd. As an accountable body, the Council takes responsibility for receipt and financial probity of external funding on behalf of the OxLEP Ltd and ensures the proper and effective use of those funds. As required in Financial Regulations, where the Council acts as an Accountable body, a formal memorandum of understanding is required which sets out the operational protocols between the Council and OxLEP Ltd.

29.   Core funding payments of £0.234m for 2024/25 were received by the council in April 2024. Funding beyond 2024/25 will be subject to a future spending review decision.

30.   From 2024/25 group accounts will be required to incorporate the accounts for the OxLEP Ltd Teckal company into the County Council's Statement of Accounts.

         Comments checked by:

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

Legal Implications

31.   There are no legal implications arising from the recommendation in the report. Legal comments are contained throughout the report and in particular within the Governance section, which sets out the role of the Council as sole member of OxLEP.

         Comments checked by:

         Paul Grant, Head of Legal and Deputy Monitoring Officer
         paul.grant@oxfordshire.gov.uk   (Legal)

Background paper:

1. Local Partnerships - LATCo guidance – Local authority company review guidance (2023) Local_Partnerships_Local-authority_company_review_guidance_2023_edition.pdf (localpartnerships.gov.uk)

MARTIN REEVES

Chief Executive

Contact Officer: Chloe Taylor, Head of Economy
                            chloe.taylor@oxfordshire.gov.uk

July 2024

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Work Programme
Performance and Corporate Services Overview and Scrutiny Committee

TBC, Chair | Tom Hudson, Scrutiny Manager
tom.hudson@oxfordshire.gov.uk

Topic	Relevant strategic priorities	Purpose	Type	Lead Presenters
19 July 2024				
LEP Integration	Work with local businesses and partners for environmental, economic and social benefit.	Committee to participate in discussions around the future shape and purpose of the LEP once it is integrated into the Council.	Overview and Scrutiny	Councillor Liz Leffman, Leader of the Council Robin Rogers, Programme Director (Partnerships and Delivery) Chloe Taylor, Head of Economy
Community Wealth Building and Wider Social Value	All	Committee to consider the advice provided to the Council by the Centre for Local Economic Studies, its ambition and its initial action plan for driving social value beyond the realm of procurement.	Overview and Scrutiny	Cllr Nathan Ley, Cabinet Member for Public Health, Inequalities and Community Safety Robin Rogers, Programme Director (Partnerships and Delivery)

				Emily Urqhart, Policy Officer
13 September 2024				
Commercial Strategy Update	All	As requested by the Committee in April, a six month update on the progress of the Commercial Strategy, particularly looking at governance arrangements to underpin the Council's commercial plans.	Overview and Scrutiny	Cllr Liz Leffman, Leader of the Council, Cllr Dan Levy, Cabinet Member for Finance Lorna Baxter, Executive Director (Resources) Ian Dyson, Director of Financial and Commercial Services
Advice Centres	Tackle Inequalities in Oxfordshire, Prioritise the health and wellbeing of residents.	To understand the rationale behind the newly-tendered advice centre contract, and to allow that to guide discussions on the best way to approach the additional funding made available in the budget for advice centres.	Overview and Scrutiny	Councillor Ley, Cabinet Member for Public Health, Inequalities and Community Safety Councillor Bearder, Cabinet Member for Adult Social Care David Munday, Consultant in Public Health Robin Rogers, Programme Director, Partnerships and Delivery

				John Pearce, Commissioning Manager (Promote, Prevent) Kate Austin, Public Health Principal
6 December 2024				
Draft Budget Scrutiny	All	To consider the robustness and suitability of the Council's draft budget, and to make any observations or recommendations accordingly.	Overview and Scrutiny	All service directors and Cabinet members
17 January 2025				
Amended Budget Scrutiny	All	To consider the robustness and suitability of the Council's budget following any updates arising from changes to funding or consultation feedback, and to make any observations or recommendations accordingly.	Overview and Scrutiny	All service directors and Cabinet members
4 April 2025				
TBC				

OXFORDSHIRE COUNTY COUNCIL

Sub-groups				
Name	**Relevant strategic priorities**	**Description**	**Outcomes**	**Members**
Democratic Processes Working Group	Local Democracy	To review the key elements of support for democratic processes at Oxfordshire County Council.	Reviews the support for the council's democratic processes and makes recommendations.	Cllr Reeves Cllr Simpson Cllr Baines Cllr O'Connor Cllr Van Mierlo Cllr Bennett

Briefings/Other					
Date	**Topic**	**Relevant strategic priorities**	**Description**	**Outcomes**	**Presenters**
TBC	County Hall Soft Marketing	Work with local businesses and partners for environmental, economic and social benefit.	To note, this is to be undertaken as a Cabinet Advisory Group rather than a Scrutiny Briefing.	Understanding of the broad options for CH following advice on its potential uses	Vic Kurzeja, Director of Property and Assets
14 Oct 2024 10:00 til 12:00	Overview of Existing Medium Term Financial Strategy (MTFS)	All	Overview of existing Medium Term Financial Strategy (MTFS). Budget & Business Planning process for 2025/26 plus risks & issues. Overview of capital	Understanding of the broad outline of budget issues.	Lorna Baxter, Executive Director (Resources) Kathy Wilcox, Head of Corporate Finance

			programme, governance and management, pipeline and risks.		
18 Nov 2024 10:00 til 12:00	Business Plan (1)	All	Introduction to the outcomes of Business Planning exercise, by directorate	Understanding of the business plans for each directorate which the budget will then seek to resource.	Specific directors TBC
22 Nov 2024 14:00 til 16:00	Business Plan (2)	All	Introduction to the outcomes of Business Planning exercise, by directorate	Understanding of the business plans for each directorate which the budget will then seek to resource.	Specific directors TBC
29 Nov 2024 10:00 til 12:00	Autumn Statement	All	Update on Autumn Statement, revenue and capital proposals and draft Review of Charges for 2025/26	Understanding the impacts of any changes from central government in the Autumn Statement and wider budget issues.	Lorna Baxter, Executive Director (Resources) Kathy Wilcox, Head of Corporate Finance
16 Jan 2025 14:00 til 16:00	Local Government Finance Settlement	All	Impact of Local Government Finance Settlement and other funding updates.	Clarity on as many sources of uncertainty within the budget process to date.	Lorna Baxter, Executive Director (Resources) Kathy Wilcox, Head of Corporate Finance

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Division(s):   N/A

CABINET - 16 July 2024

FORWARD PLAN AND FUTURE BUSINESS

Items identified from the Forward Plan for Forthcoming Decision

Topic/Decision   **Portfolio/Ref**

Cabinet, 17 September 2024

Topic/Decision	Portfolio/Ref
▪ **Sustainable school travel strategy** To seek approval of strategy for adoption and publication on County website	Cabinet, 2024/141 - Cabinet Member for Transport Management
▪ **Treasury Management Quarter 1 Report 2024/25** To provide an update on Treasury Management Activity in 2024/25 in accordance with the CIPFA code of practice.	Cabinet, 2024/163 - Cabinet Member for Finance
▪ **Business Management and Monitoring Report - July 2024** The business management reports are part of a suite of performance, risk and budget documents which set out our ambitions, priorities, and financial performance.	Cabinet, 2024/200 - Cabinet Member for Finance
▪ **Capital Programme Approvals - September 2024** Report on variation to the capital programme for approval (as required).	Cabinet, 2024/201 - Cabinet Member for Finance
▪ **Ethical Procurement Policy** The purpose of the Ethical Procurement Policy is to outline the Council's position on various aspects of ethics in procurement as well as to provide appropriate detail on how the Council approaches such matters and how it expects its suppliers and potential suppliers to approach such matters. The Ethical Procurement Policy includes a large section on modern slavery and also covers other areas such as expectations for suppliers, responsibilities of staff, fair employment practices in the supply chain, as well as reporting and whistleblowing.	Cabinet, 2024/204 - Cabinet Member for Finance

Delegated Decisions by Deputy Leader of the Council with Responsibility for Climate Change, Environment & Future Generations, 5 September 2024

▪ **Household Waste Recycling Centres (HWRC) - New CCTV provision with ANPR cameras** To approve installation of new enhanced CCTV system across all HWRC's. including new ANPR (Automated Number Plate Recgnotion)	Delegated Decisions by Deputy Leader of the Council with Responsibility for Climate Change, Environment & Future Generations, 2024/056 - Deputy Leader of the Council with Responsibility for Climate Change, Environment & Future Generations

Delegated Decisions by Cabinet Member for Children, Education & Young People's Services, 11 September 2024

▪ **South Central Residential Framework** OCC are part of the South Central Residential Framework, alongside 21 other LA's. It is a framework for Residential Children;s Homes. There are many benefits to be a part of the framework.	Delegated Decisions by Cabinet Member for Children, Education & Young People's Services, 2024/244 - Cabinet Member for Children, Education & Young People's Services
▪ **Funding Contribution towards Joint Commissioned CAMHS Contract with BOB ICB (2024-25)** OCC funding contribution of £754k towards ICB CAMHS contract total value >£17million for 2024-25 delivered by Oxford Health.	Delegated Decisions by Cabinet Member for Children, Education & Young People's Services, 2024/238 - Cabinet Member for Children,

	Education & Young People's Services

Delegated Decisions by Cabinet Member for Community & Corporate Services, 16 July 2024

▪ **DSIT 5G Innovation Regions project - England's Connected Heartland** DSIT have grant funded OCC with £3.8m. OCC needs to procure two contracts, each estimated at c £1.5m, using the DSIT grant. Decision will be required for award of contracts	Delegated Decisions by Cabinet Member for Community & Corporate Services, 2024/050 - Cabinet Member for Community & Corporate Services

Delegated Decisions by Cabinet Member for Transport Management, 5 September 2024

▪ **Souldern: Proposed 20 Mph Speed Limits** This proposal is part of the County wide 20 Mph Speed Limit Project (Phase 3).	Delegated Decisions by Cabinet Member for Transport Management, 2024/083 - Cabinet Member for Transport Management
▪ **Berinsfield: 20 Mph Speed Limit Proposals** To determine speed limits after consideration of any formal consultation responses	Delegated Decisions by Cabinet Member for Transport Management, 2024/071 - Cabinet Member for Transport Management
▪ **Culham: 20 Mph Speed Limit Proposals** To determine speed limits after consideration of any formal consultation responses	Delegated Decisions by Cabinet Member for Transport Management,

	2024/073 - Cabinet Member for Transport Management
▪ **Permitting Cycling in Queen St and Cornmarket St** To seek approval to proceed with an ETRO (Experimental Traffic Regulation Order) to lift the ban on cycling which is currently in operation between 10 AM and 6 PM. The Team also seeks approval to reconfigure elements of public furniture to make the streets more legible, promoting a more peaceful interaction between transport modes.	Delegated Decisions by Cabinet Member for Transport Management, 2024/219 - Cabinet Member for Transport Management
▪ **Kiddington: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/157 - Cabinet Member for Transport Management
▪ **Kelmscott: Proposed 20mph Speed Limits** Part of Phase 3 of Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/156 - Cabinet Member for Transport Management
▪ **Shipton-on-Cherwell: Proposed 20mph Speed Limits** Part of Phase 3 of Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/155 - Cabinet Member for Transport Management
▪ **Hampton Gay & Poyle: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/154 - Cabinet Member for Transport

		Management
▪ **Northmoor: Proposed 20mph Speed Limits** Part of Phase 3 of Countywide 20mph Speed Limit Project		Delegated Decisions by Cabinet Member for Transport Management, 2024/153 - Cabinet Member for Transport Management
▪ **Rotherfield Peppard: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.		Delegated Decisions by Cabinet Member for Transport Management, 2024/177 - Cabinet Member for Transport Management
▪ **Stoke Row: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project		Delegated Decisions by Cabinet Member for Transport Management, 2024/176 - Cabinet Member for Transport Management
▪ **Wheatley: Proposed 20mph Speed Limits** Part of Phase 3 Countywide Speed Limit Project.		Delegated Decisions by Cabinet Member for Transport Management, 2024/175 - Cabinet Member for Transport Management
▪ **Holton: Proposed 20mph Speed Limit Extension** Part of Phase 3 Countywide 20mph Speed Limit Project.		Delegated Decisions by Cabinet Member for Transport Management, 2024/174 - Cabinet Member for Transport Management
▪ **Buscot: Buscot & Buscot Wick - Proposed 20mph Speed Limits** Part of Phase 3 of Countywide 20mph Speed Limit Project		Delegated Decisions by Cabinet Member

	for Transport Management, 2024/173 - Cabinet Member for Transport Management
▪ **Fyfield & Tubney: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limits	Delegated Decisions by Cabinet Member for Transport Management, 2024/172 - Cabinet Member for Transport Management
▪ **Radley: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/171 - Cabinet Member for Transport Management
▪ **Stanford-in-the-Vale: Proposed 20mph Speed Limits** Part of Phase 3 of Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/170 - Cabinet Member for Transport Management
▪ **Shutford: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project	Delegated Decisions by Cabinet Member for Transport Management, 2024/169 - Cabinet Member for Transport Management
▪ **Goddington: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/161 - Cabinet Member

	for Transport Management
A4074-B4015 Connecting Lane Junction Closure There have been motorcyclists fatalities at this road junction due to right turn from the A4074 southbound into the lane. This is a Vision Zero Road Safety Scheme designed to prevent similar incidents in the future.	Delegated Decisions by Cabinet Member for Transport Management, 2024/160 - Cabinet Member for Transport Management
East Hagbourne: 20mph Speed Limit Proposals Part of Phase 3 of the County-wide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/115 - Cabinet Member for Transport Management
Freeland: 20 Mph Speed Limit Proposals Part of the County-wide 20 Mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/085 - Cabinet Member for Transport Management
A422, Hennef Way, Banbury - Proposed 40mph Speed Limits To seek approval for the introduction of a new 40mph limit. The introduction of a 40mph limit is being promoted on the A422 Hennef Way, Banbury as part of the DfT United States Visiting Forces road safety initiative. The objective is to improve road safety by reducing speeds and the risk of collisions at junctions.	Delegated Decisions by Cabinet Member for Transport Management, 2024/237 - Cabinet Member for Transport Management
A4260 - between Bodicote and Adderbury - Proposed 40mph Speed Limits To seek approval for the introduction of a new 40mph limit. A 40mph limit is being promoted as part of the DfT United States Visiting Forces road safety initiative. This is required in order to improve road safety by reducing traffic speeds between Bodicote and Adderbury	Delegated Decisions by Cabinet Member for Transport Management, 2024/236 - Cabinet Member for Transport Management

▪ **A44 Manor Road, Woodstock - Proposed 30mph Speed Limit Extension** To seek approval for the extension of an existing 30mpg speed limit on the A44 Manor Road, Woodstock. Extension of the existing 30mph speed limit on the A44 Manor Road to be extended beyond the proposed right turning lane for the site access is to maintain the 30mph speed beyond the proposed site access for pedestrian and vehicle safety	Delegated Decisions by Cabinet Member for Transport Management, 2024/235 - Cabinet Member for Transport Management
▪ **Brize Meadow: Proposed 20mph Speed Limits** To seek approval for the introduction of a 20mph speed limit on the Brize Meadow development in Brize Norton. The promotion of a 20mph speed limit on the Brize Meadow Development, to ensure road safety is maintained	Delegated Decisions by Cabinet Member for Transport Management, 2024/234 - Cabinet Member for Transport Management
▪ **Proposed Traffic Calming - B4027, Wheatley Road, Islip** To seek approval for the introduction of traffic calming measures on the B4027 Wheatley Road, Islip Proposals are being brought forward for speed cushions on the B4027 Wheatley Road, Islip in order to reduce traffic speeds and reinforce the 20mph speed limit on the approach to the new traffic signals that are being installed on Islip Bridge	Delegated Decisions by Cabinet Member for Transport Management, 2024/233 - Cabinet Member for Transport Management
▪ **School Street Phase 2 - Proposed Use of ANPR Cameras to Enforce the Phase 2 School Streets** Decision is required on the proposed use of ANPR Cameras to enforce the Phase 2 School Streets.	Delegated Decisions by Cabinet Member for Transport Management, 2024/232 - Cabinet Member for Transport Management
▪ **Elms Road, Thame - Proposed No Waiting At Any Time Restrictions** To seek approval for the introduction of waiting restrictions associated with a s278 agreement.	Delegated Decisions by Cabinet Member for Transport Management, 2024/228 - Cabinet Member for Transport Management
▪ **West Hendred: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.	Delegated Decisions by

	Cabinet Member for Transport Management, 2024/152 - Cabinet Member for Transport Management
▪ **Letcombe Regis: Proposed 20mph Speed Limits** Part of Phase 3 Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/151 - Cabinet Member for Transport Management
▪ **Little Wittenham: Proposed 20mph Speed Limits** Part of Phase 3 of Countywide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/150 - Cabinet Member for Transport Management
▪ **Hook Norton: Proposed 20mph Speed Limits** Part of Phase 3 of County-wide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/143 - Cabinet Member for Transport Management
▪ **Fernham: Proposed 20mph Speed Limits** Part of Phase 3 of County-wide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/126 - Cabinet Member for Transport Management
▪ **Appleford: Proposed 20mph Speed Limits** Part of Phase 3 County-wide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/125 -

	Cabinet Member for Transport Management
▪ **Denchworth: Proposed 20mph Speed Limits** Part of Phase 3 of County-wide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/124 - Cabinet Member for Transport Management
▪ **Stadhampton: Proposed 20mph Speed Limits** Part of Phase 3 County-wide Speed Limits Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/123 - Cabinet Member for Transport Management
▪ **Horspath: Proposed 20mph Speed Limits** Part of Phase 3 County-wide 20mph Speed Limit Project	Delegated Decisions by Cabinet Member for Transport Management, 2024/122 - Cabinet Member for Transport Management
▪ **Horley: Proposed 20mph Speed Limits** Part of Phase 3 of the County-wide 20mph Speed Limit Project.	Delegated Decisions by Cabinet Member for Transport Management, 2024/121 - Cabinet Member for Transport Management
▪ **Hornton: Proposed 20mph Speed Limits** Part of Phase 3 County-wide 20mph Speed Limit Project	Delegated Decisions by Cabinet Member for Transport Management, 2024/120 - Cabinet Member for Transport Management

▪ **Ducklington: Proposed 20mph Speed Limits** Part of Phase 3 County-wide 20mph Speed Limit Project	Delegated Decisions by Cabinet Member for Transport Management, 2024/119 - Cabinet Member for Transport Management
▪ **Chadlington: Proposed 20mph Speed Limits** Part of Phase 3 County-wide 20mph Speed Limit Project	Delegated Decisions by Cabinet Member for Transport Management, 2024/118 - Cabinet Member for Transport Management
▪ **Sibford Gower: Proposed 20mph Speed Limits** Part of Phase 3 of County-wide 20mph Speed Limit Project	Delegated Decisions by Cabinet Member for Transport Management, 2024/117 - Cabinet Member for Transport Management

Delegated Decisions by Cabinet Member for Infrastructure & Development Strategy, 15 August 2024

▪ **Tramway Accessibility Improvements - Contracts and Agreements** Delegate authority to the Director of Transport and Infrastructure in consultation with the Head of Legal and Deputy Monitoring Officer to finalise the target cost and programme for Stage 2 (Construction) and issue a Notice to Proceed to Milestone Infrastructure Ltd under the existing NEC 4 Engineering and Construction Contract for the Tramway Accessibility Improvements	Delegated Decisions by Cabinet Member for Infrastructure & Development Strategy, 2024/096 - Cabinet Member for Infrastructure and Development Strategy

Delegated Decisions by Cabinet Member for Infrastructure & Development Strategy, 5 September 2024

▪ **A423 Kennington Improvement Programme - Contracts and Agreements** To consider a recommendation to enter in to construction contract for A423 Kennington Improvement Programme.	Delegated Decisions by Cabinet Member for Infrastructure & Development Strategy, 2023/152 - Cabinet Member for Infrastructure and Development Strategy

Delegated Decisions by Cabinet Member for Adult Social Care, 17 September 2024

▪ **Live Well at Home Framework** Deployment of contract extension from April 25.	Delegated Decisions by Cabinet Member for Adult Social Care, 2024/241 - Cabinet Member for Adult Social Care
▪ **Specialist Dementia Bed Block Provision - July 2024** Contract extension for 12 months from July 2024.	Delegated Decisions by Cabinet Member for Adult Social Care, 2024/240 - Cabinet Member for Adult Social Care
▪ **Specialist Dementia Bed Block Provision - July 2023** Retrospective approval for contract award – July 2023.	Delegated Decisions by Cabinet Member for Adult Social Care, 2024/239 - Cabinet Member for Adult Social Care

CABINET
18 JUNE 2024

ANNUAL PERFORMANCE REPORT AND
PROVISIONAL REVENUE OUTTURN 2023/24

Report by the Executive Director of Resources and Section 151 Officer

RECOMMENDATION

1. **The Cabinet is RECOMMENDED to**

   a. To note the annual Performance Report for 2023/24.
   b. To note the summary of the provisional year - end financial position for 2023/24 along with the year-end position on general balances and earmarked reserves as explained in Annex B.
   c. To agree that the £1.6m surplus on the On-Street Parking Account at the end of the 2023/24 financial year, that has not yet been applied to fund eligible expenditure in accordance with Section 55(4) of the Road Traffic Regulation Act 1984, can be carried forward to the 2024/25 financial year as set out in Annex B-3c.
   d. To approve the creation of a new reserve to support the council's Commercial Strategy and initial contribution of £2.0m.
   e. To approve the addition of £2.8m to the IFRS9 Reserve.
   f. To approve the addition of £1.0m to the Budget Priorities Reserve.
   g. To note the Digital Inclusion Action Plan progress update for 2023/24 – Annex C.
   h. To note the Voluntary and Community progress update for 2023/24 – Annex D.

   Executive Summary

2. This report presents the council's annual performance report and provisional year- end finance position for 2023/24.

3. The Council recognises the importance of timely, accurate and accessible performance and budget management information as part of its commitment to both transparency and demonstrating efficiency and effectiveness.

4. This annual report reflects the end of year position against the corporate priorities, and budget documents supporting the ambitions and priorities. The Strategic Plan agreed by Council in February 2022 set out the Council's ambitions for 2023/24.

5. The Strategic Plan, Medium Term Financial Plan, Outcomes Framework and previous business management reports, can be found on the council's website.

6. This report summarises the performance over the last financial year. Further information is provided in the following annexes:
   a. Annex A: Annual performance report 2023/24.
   b. Annex B: Provisional revenue outturn 2023/24.
   c. Annex C: Digital Inclusion Action ~~Page 89~~ progress update for 2023/24.
   d. Annex D: Voluntary and Community Strategy progress update for 2023/24.

Performance Overview

7. The Outcomes Framework 2023/24 sets out the golden thread of key performance indicators and progress measures supporting the overarching nine strategic priorities and running the business priority.

8. The bi-monthly business management and monitoring reports included progress updates supporting the nine strategic priorities, overarching indicators which comprised of 85 key performance indicators and progress measures.

End of year 2023/24 performance summary:

9. The end of financial year performance indicators are reported as follows:

Green	Amber	Red	Data Monitoring	Data Unavailable	Total
58 (68%)	10 (12%)	8 (10%)	7 (8%)	2 (2%)	85

Table 1 – End of year performance summary for 2023/2024

This represents a strong outcome of the measures and indicators supporting the overarching priorities for the financial year with:

- 80% either above target or very close to it.

- 10% below target.

The release of data required to calculate the position for OCC02.04 Inequality in life expectancy at birth (Female) and OCC02.05 Inequality in life expectancy at birth (male) indicators has been delayed by the Office for National Statistics, therefore no performance update is available for the reporting period.

10. The annual report reflects the highlights and achievements over the last 12 months against the priorities of the council. The annual report captures the response to the cost of living crisis and the migration support; the significant impact on the services we deliver; how we coordinated and supported the delivery of services.

11. Included below are some highlights that services have delivered during 2023/24. Please refer to the Annex A: Annual report 2023/24 for the full overview of how services have delivered against our nine priorities and our response to the cost of living crisis and provided migration support.

12. Through our continued commitment to the **Climate emergency**, Oxfordshire County Council won best decarbonisation initiative for its role in the partnership Project Local Energy Oxfordshire. We delivered an externally funded food waste recycling project, calling at over **13,000 households** across the county to encourage residents to recycle their food waste. We were again named the **top performing county council waste disposal authority**. In 2022/23, residents recycled, reused, or composted 57.2 per cent of their household waste, according to the latest government figures.

13. As part of our commitment to **tackling inequality across Oxfordshire** we spent **£1m** on our new Residents Support Scheme, providing over **5,000 vulnerable households** in financial crisis support with food and energy costs, and essential household items. We spent **£1.6m** making a **£450 cost of living payment** to over **3,500 people** on low incomes who were not eligible for the equivalent national payments. We spent **£3.2m** ensuring families of children entitled to free school meals received support with food costs during the school holidays.

14. **Health and Wellbeing priority**. We worked with a range of community groups and consulted **over 1000 residents** to develop a new Health and Wellbeing Strategy for Oxfordshire. Working with partners across Oxfordshire, **we trained 348 staff and volunteers to use the Making Every Contact Count** (MECC) approach to opportunistically speak to people about their health and wellbeing. A further 36 members of staff became qualified MECC trainers. Through outreach to communities to enable those residents who experience the greatest barriers to walking and cycling to actively travel more. **74% of Active Travel project participants** report having increased the frequency that they walk, cycle, or wheel after having taken part in the project.

15. Supporting **carers and the social care** system through our transformation programme – **the Oxfordshire Way** – we continued to have a positive impact on adult social care assessments and reviews, achieving a 31 per cent decrease in the number of people on waiting lists and a 46 per cent reduction on April 2021 waiting times. Between April 2023 and February 2024, **we supported 1667 Carers** with a direct payment to support them to have some time to look after their own wellbeing, an increase of 4.2% on previous year's performance.

16. We have increased the Oxfordshire Together programme to around **130 FixMyStreet (FMS) 'SuperUsers'** covering **95 parishes** across the county. Across the calendar year they reported and directly instructed repairs to **1379 defects to potholes and kerbing on county roads**. Our pilot **Flood Warden scheme** now has **11 volunteers covering two parishes and one town**.

17. Some of the achievements supporting **Nature and Green Spaces** have accomplished include **clearing 320 km of vegetation** to improve the county' s public rights of way network. We repaired 48 bridges and replaced 58 bridges across Oxfordshire. We continued our highly successful partnership with Community Action Groups, supporting over 100 groups to take grassroots action on environmental issues across Oxfordshire which was featured as best practice in a national report.

18. As part of the priority **Creating opportunities for children and young people to reach their full potential,** we completed all the phase transfers (primary to secondary) for over **500** children with EHCPs within the agreed timeframe. Thanks to DfE and Capital Funding, **five** new children's homes are due to open in Oxfordshire within the next 18 months (Aspen House, Peak House, Willowbank, Oathill Lodge, Greatmead).

19. As part of our priority **Playing a part in vibrant and participatory local democracy** we enabled people of all ages to address our council and cabinet meetings, welcoming over 115 public speakers, 97 public questions and 6 petitions. Including facilitating over **30 public speakers** at October 2023 Cabinet.
We have established the new Education & Young People Overview & Scrutiny Committee.

20. Through **Working with local businesses and partners** our trading standards Inspectors of Weights and Measures tested and verified **over 700 pieces** of weighing and measuring equipment. The trading standards team conducted over **1790 interventions with Oxfordshire businesses,** providing advice and support, testing products and procedures**.** Our small team of highly skilled fire safety professionals have engaged with existing and new build commercial premises in Oxfordshire to create a safe environment for those who live and work in the county. This includes **450 Fire Safety Audit of commercial premises** and **692 Fire Safety Building Regulations consultations**. We will take oversight for the Oxfordshire Local Enterprise Partnership (OxLEP). It has a long and successful track record and, between 2016 and 2022, it worked with over 6,200 businesses

and provided around 18,000 hours of support and advice (worth over £28.75 million).

21. **Migration Support** Development and delivery of a **£1.2m employment investment programme** to support Ukrainians into meaningful work, with wider benefits being created for other migrant groups wherever possible. A range of county council services have worked closely with the District / City Councils to provide support and challenge to the hotel providers accommodating over **550 asylum seekers** in four contingency hotels commissioned by the Home Office to ensure their statutory safeguarding needs are being met, the children are able to attend school, and all can access our libraries.

Digital Inclusion Strategy Action plan 2023/24 – Progress updates

22. Oxfordshire County Council's [Digital Inclusion Strategy](#) (DIS)was approved by Cabinet in July 2022. The 2022-2025 Strategy sets out the council's framework to enable a digitally inclusive Oxfordshire, shaped by three key priority areas (the action plan follows the same structure):

- Digitally Inclusive Communities
- Digitally Inclusive Service Delivery
- Digitally Inclusive Workforce

In autumn 2022, the Digital Inclusion Strategy was integrated with the service planning cycle, and this action plan developed in summer of 2023 included actions derived from service delivery plans from across the organisation. These actions were further developed through conversations with colleagues across services to ensure they were aligned with the strategy's commitments. All actions are aligned with one of the strategy's priority areas, though many of the actions span multiple priority areas. All actions aim to deliver benefits for the council, the sector, and residents. This action plan provides a progress update for the year 2023/24.

Long term ambition	Completed	Ongoing	Removed	Total
Digitally Inclusive Communities	7	9	1	17
Digitally Inclusive Service Delivery	6	8	N/A	14
Digitally Inclusive Workforce	2	1	2	5
Total	**15 (42%)**	**18 (50%)**	**3 (8%)**	**36**

Table 2 – End of year DIS action plan performance summary for 2023/2024

Voluntary and Community Sector Action Plan 2023/24 - Progress updates

23. The Oxfordshire County Council Voluntary and Community Sector (VCS) Action Plan, which was approved by Cabinet in July 2022, exists to implement the aims and commitments as set out in the VCS 2022 – 2027 Strategy. The strategy sets out the council's framework to support a sustainable VCS through co-production and partnership working, shaped by five key priority areas:
- Collaboration and Networking
- Volunteering and Social Action
- Capacity and Skills
- Supporting a Sustainable Sector
- Reducing Inequalities.

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In autumn 2022, the VCS Strategy was integrated with the service planning cycle, and this action plan developed in summer of 2023 included actions derived from service delivery plans from across the organisation. These actions were further developed through conversations with colleagues across services to ensure they were aligned with the strategy's commitments. The actions support the strategy's aims and deliver meaningful outcomes, enhanced partnership working and alignment with our overarching strategic priorities, such as tackling inequalities and the health and wellbeing of residents. All actions are aligned with one of the strategy's priority areas, though many of the actions span multiple priority areas. All actions aim to deliver benefits for the council, the sector, and residents.

This action plan provides a progress update for the year 23-24. This update will later be taken to the Oxfordshire Stronger Communities Alliance (OSCA).

Long term ambition	Completed	Ongoing	Removed	Total
Collaborating and Networking	16	11	3	30
Volunteering and Social action	6	2	N/A	8
Capacity and Skills	2	2	1	5
Supporting and Sustainable sector	3	3	1	7
Reducing Inequality	2	3	N/A	5
Total	**29 (53%)**	**21 (38%)**	**5 (9%)**	**55**

Table 3 – End of year VCS action plan performance summary for 2023/2024

Financial Management

Summary of the Council's financial position at the end of 2023/24

24. The table below shows actual expenditure for each directorate compared to the final budget and shows the movement since the report to Cabinet in March 2024. The final directorate position was an overspend of £6.6m (+1.1%).

25. The directorate overspend was offset by an underspend of £10.9m on contingency held for risk and additional interest received on cash balances (£7.9m). The overall position for the council was an underspend of £12.3m or -2.1% of the Net Operating Budget.

Directorate Budgets	Final Net Budget	Total Spend	Year End Variance	Year End Variance	Variance Last Cabinet Reporting Month	Change in Variance
	£m	£m	£m	%	£m	£m
Adult Services	229.7	229.7	0.0	0.0%	0.0	0.0
Childrens' Services	172.3	180.0	7.7	4.5%	12.9	-5.2
Environment & Place	75.3	72.2	-3.2	-4.2%	-2.9	-0.3
Public Health	4.1	3.9	-0.2	-3.7%	0.0	-0.2
Community Safety	27.0	27.7	0.7	2.5%	0.4	0.3
Resources	73.3	73.9	1.5	2.1%	1.9	-0.4
Total Directorate Budgets	**581.8**	**588.4**	**6.6**	**1.1%**	**12.3**	**-5.7**
Budgets Held Centrally	-3.0	-22.0	-19.0	624.6%	-12.3	-6.7

Directorate Budgets	Final Net Budget	Total Spend	Year End Variance	Year End Variance	Variance Last Cabinet Reporting Month	Change in Variance
	£m	£m	£m	%	£m	£m
Net Operating Budget	**578.8**	**566.5**	**-12.4**	**-2.1%**	**0.0**	**-12.4**
Business Rates and Council Tax funding	-578.8	-578.8	0.0	0.0%	0.0	0.0
Year-End Position	**0.0**	**-12.3**	**-12.3**		**0.0**	**-12.4**

26. As agreed as part of the 2024/25 budget, £1.5m of the underspend arising from additional interest on cash balances will be used to fund a one – off revenue contribution to the Transformation Reserve in 2024/25. A further £2.2m will be used to make an initial contribution to a new reserve to manage the risk pending the end of the statutory over-ride for IFRS9 (changes in the value of Treasury Management Pooled Funds at year end) which may impact on the revenue account in 2025/26. This means that £3.7m of the underspend that will be held in balances as at 31 March 2024 is already committed in 2024/25.

27. Since the underspend is higher than anticipated as a result of the reduction in the directorate overspend it is recommended to:

   • Add a further £2.8m to the IFRS9 reserve in 2024/25, increasing the total to £5.0m. That should then provide sufficient cover for future risks.
   • Create a new Pump Priming reserve in 2024/25 to support the council's Commercial Strategy with an initial contribution of £2.0m.
   • Make a contribution of £1.0m to the Budget Priorities Reserve to be used to complete or extend schemes already agreed as part of the Cabinet's priorities including Rail Studies and an extension of the funding for efficiency loans to schools.

28. After taking account of the use of contingency and additional interest on balances, planned changes above as well as supplementary estimates agreed earlier in the year, balances would be £42.0m, £11.8m above the risk assessed level of £30.2m at year end. £9.5m of the total will be used to fund contributions to reserves in 2024/25 as set out in paragraph 26 and 27. The remaining £2.3m will be held in balances pending a decision about future use.

29. On 1 April 2023, one – off funding held in earmarked reserves totalled £202.7m. As set out in Annex B-3a this increased to £210.1m as at 31 March 2024. The increase includes budgeted net contributions to/from reserves totalling £12.8m agreed in February 2023, plus other net changes during the year which reduced reserves by £5.4m.

30. The 2023/24 deficit compared to Dedicated Schools Grant (DSG) funding for High Needs was £14.7m. This is £3.6m lower than the £18.3m forecast deficit for 2023/24 approved by Cabinet in May 2023. The CIPFA code of practice currently requires negative High Needs DSG balances to be held in an unusable reserve. The deficit would increase the cumulative negative High Needs DSG balance held in this reserve from £41.1m as at 31 March 2023 to £55.8m at 31 March 2024.

31. Further details and commentary explaining both the directorate positions and variations on budgets held centrally are included in Annex B.

Financial Implications

32. This report sets out the financial position for the council as at 31 March 2024. While there is an underspend at year end as a result of additional interest on balances

and the use of contingency, the directorate position is overspent, albeit by less than anticipated earlier in the year as a result of sustained management action throughout the year.

33. The budget for contingency is lower and an increased level of interest on cash balances is already built into in the budget for 2024/25 so strong financial management and oversight will continue to be required in 2024/25.

Comments checked by: Kathy Wilcox, Head of Corporate Finance

Legal Implications

34. The Council's constitution at Part 3.2 (Budget and Policy Framework) sets out the obligations and responsibilities of both the Cabinet and the Full Council in approving, adopting and implementing the council's budget and policy framework.

35. The Council has a fiduciary duty to council taxpayers, which means it must consider the prudent use of resources, including control of expenditure, financial prudence in the short and long term and the need to act in good faith in relation to compliance with statutory duties and exercising statutory powers. The report sets out the performance and finance position for the Council as at 31 March 2024 as part of its fiduciary duty to implement budgetary controls and monitoring.

Comments checked by: Anita Bradley Director of Law and Governance and Monitoring Officer.

LORNA BAXTER Executive Director of Resources and Section 151 Officer	

Contact Officers:

Louise Tustian, Head of Insight and Corporate Programmes

Kathy Wilcox, Head of Corporate Finance

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Annual report

2023 - 2024

Working in partnership to make Oxfordshire a greener, fairer and healthier county.

Greener

Fairer

Healthier

OXFORDSHIRE COUNTY COUNCIL

Foreword

Welcome to Oxfordshire County Council's annual report, providing an overview of our performance and key achievements from April 2023 to March 2024.

Our vision is to make Oxfordshire a greener, fairer and healthier county, and this is centred around strong local communities, healthy places to live and a zero-carbon economy that benefits everyone.

Including everyone lies at the heart of our vision. This means providing inclusive services with equal access for all; working with communities to tackle disadvantage, inequality, public health and care issues; and providing an inclusive workplace with equality of opportunity. We want to enable people across the county to be happy, healthy, safe and successful, from getting the best start in life to ageing well and remaining as independent as possible for as long as possible.

We also want to ensure that our decision-making process is inclusive, providing different opportunities for communities to make their views known on the issues that matter to them.

Tackling climate change underpins all we do as the climate emergency is the biggest challenge the planet faces. Our commitment to net zero is shown by the fact that we were ranked as the top-performing county council waste disposal authority for the tenth year running and the top county council for action on climate change according to Climate Emergency UK's 2023 council climate scorecard assessment.

Our strategic plan 2022 - 2025 sets out our nine cross-cutting priorities (see page 4) and details how we will deliver our vision and commitments.

Our budget, set in February 2024, also supports the continued delivery of our plan, which is reviewed annually, and allows us to both invest in our priorities and meet our demand pressures for the year ahead. We listened carefully to the feedback given in our residents' survey and in our budget consultation and engagement events and invested £10.6 million in the things you said we should focus on. This means we'll continue to protect those in need, while investing in roads and improving services for children and families, particularly those with special educational needs and disabilities.

Social care services for adults and children accounts for around half our spend. We also provide services such as fire and rescue, highway maintenance, libraries, registration (births, deaths and marriages), education and trading standards. Our annual report highlights examples of this important work and progress against our priorities.

Thank you for taking the time to read this report. As we look forward to 2024 - 25, we will continue to ensure that we provide the greatest opportunities possible for every resident to live their best life.

Councillor Liz Leffman, Leader of Oxfordshire County Council

Our nine priorities

Our vision

To lead positive change by working in partnership to make Oxfordshire a greener, fairer and healthier county.

1. Put action to address the climate emergency at the heart of our work

2. Tackle inequalities in Oxfordshire

3. Prioritise the health and wellbeing of residents

4. Support carers and the social care system

5. Invest in an inclusive, integrated and sustainable transport network

6. Preserve and improve access to nature and green spaces

7. Create opportunities for children and young people to reach their full potential

8. Play our part in a vibrant and participatory local democracy

9. Work with local businesses and partners for environmental, economic and social benefit

Greener

Fairer

Healthier

The climate emergency

Our strategic priority

Put action to address the climate emergency at the heart of our work
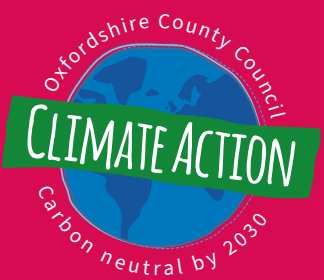
- We helped residents recycle, reuse or compost 57.2 per cent of household waste, making us the **top-performing county council waste disposal authority for the tenth year running.**

- We were rated the **top county council for action on climate change** in Climate Emergency UK's 2023 council climate scorecard assessment.

- We were awarded £6.4 million by the government to provide **energy efficiency upgrades and low carbon heating** to low-income households living in fuel poverty.

- We have almost **completed our LED street lighting conversion programme**, which will cut costs and emissions by almost 70 per cent, saving 6,000 tonnes of CO2 each year.

- We were awarded £41,000 to establish **disposable vapes recycling collection points**, helping to reduce littering and ensure their safe disposal.

- We were awarded £3.6 million by the government to **triple the number of public electric vehicle chargers** in the county, which will bring 1,300 more chargers by the end of 2025.

- We secured a £2.9 million grant to support the **decarbonisation of 26 of our county council sites**, with delivery starting in 2024/25.

- We completed the **installation of electric vehicle chargers** at community support service sites in preparation for 10 new electric minibuses arriving in spring 2024.

- We launched a **strategy to tackle poor air quality** and together with our city and district council partners launched a new Oxfordshire air quality website, providing guidance and resources.

- We supported **over 100 community action groups** to take action on environmental issues across Oxfordshire. This was featured as best practice in a national report.

- We introduced an **online booking system** to support a change in legislation on DIY waste at our household waste recycling centres.

- We delivered a **food waste recycling project**, visiting 13,000 households across the county to encourage residents to recycle their food waste.

- Our pilot scheme for **flood wardens** now has 11 volunteers covering two parishes and one town.

- We developed a **heat health action plan** to support vulnerable residents during possible heatwaves and planning for extreme heat.

- We convened a 'l00 Together' conference in January 2024, bringing together policy makers, business leaders, academics and investors to discuss how we can **unlock the investment needed to deliver environmental activity at scale** in Oxfordshire.

Greener

Travel and transport

Invest in an inclusive, integrated and sustainable transport network

- **20mph speed limits** were introduced in Abingdon, Thame and Wallingford, with applications from parishes topping 230. The scheme is designed to save lives, reduce congestion, improve air quality, and encourage cycling and walking.

- In partnership with bus operators, we launched **one of the biggest UK fleets of electric buses outside London**. The £83.8 million project will deliver 159 new battery buses onto the roads of Oxford.

LODGE HILL SLIPROADS

- We secured £17.3 million of funding from Homes England to help fund the **A34 Lodge Hill interchange scheme**. The main construction of the new south-facing A34 slip roads is due to start in autumn 2024.

- We **completed three major infrastructure programmes**, including the remodelling of the A41 Ploughley Road junction, improvements to the Oxford North highway, and work on the North Oxford Corridor between Loop Farm roundabout and Cassington Road.

- We **started construction work on several major infrastructure schemes**, including upgrading the junction of the A4095 and Banbury Road in Bicester and improvements to the Kidlington roundabout.

- We increased the number of FixMyStreet super users to 130, covering 95 parishes across the county. They **reported and instructed repairs to 1,379 defects to potholes and kerbing** on county roads.

- Together with our contractor Milestone Infrastructure, we trialled an **innovative method of road resurfacing**, which reduces carbon by 50 per cent and avoids thousands of tonnes of construction waste.

- We awarded £425,000 in grants to 12 organisations to **help improve community transport** in Oxfordshire, including funding new vehicles, expanding schemes and providing new services.

- We were awarded £2.384 million by Active Travel England to invest in projects to **improve walking and cycling infrastructure** in the county.

- 74 per cent of people who participated in our active travel outreach project reported they had **increased their frequency of walking, cycling or wheeling**.

Greener

Nature and green spaces

Our strategic priority

Preserve and improve access to nature and green spaces

- We were named by the government as a **'responsible authority' for driving nature recovery**, with accompanying funding to help us develop a nature recovery strategy to tackle habitat loss, safeguard our fragile ecosystems, and create nature-rich landscapes.

- Our countryside access team **repaired and replaced 106 bridges and cleared 320km of vegetation**.

- We secured funding to provide much needed **access improvements to the public rights of way that make up the 65 mile Green Belt Way**.

- We received 50 submissions from residents for a tree and woodland planting project and secured funding to create **20 new community orchards**.

- Our tree service team helped a group of volunteers in Wantage **plant 14 apple trees** in one day to create an orchard that will be available for the local community to enjoy for years to come.

- We created an in-house **tree aftercare and planting service**, who in their first four weeks of operation planted 150 trees.

- We inspected more than 3,700 individual or groups of trees, and arranged and completed more than **3,843 tree care operations**.

- We set up a **tree guardians scheme** – a network of volunteers to look after thousands of newly planted trees on public land across Oxfordshire.

- We transferred the lease of a council-owned meadow in Swinford to the owners of the Thames Valley wildflower meadow restoration project to help create **a nature recovery network and habitat corridor** linking a series of ancient meadows.

- Using £200,000 from developer funding, we resurfaced bridleways in Botley and Heyford Park, improved a footpath in Watchfield, and undertook improvements at Crowell to **improve access to the countryside**.

Greener

Greener

Tackling inequalities

Our strategic priority

Tackle inequalities in Oxfordshire

Fairer

- We completed **community insight profiles** for the 10 areas in Oxfordshire most likely to experience health inequalities, providing an in-depth understanding of local communities to help inform support.

- We set up a **community research network**, with funding support from UK Research and Innovation, to carry out research into what makes people healthy, helping to improve health and tackle inequalities across the county.

- We scaled up our Better Housing Better Health programme by 200 per cent **to meet the needs of households facing fuel poverty**.

- We launched a new residents' support scheme and provided 3,620 vulnerable households in financial crisis with **emergency financial support** to cover food, energy and essential household costs.

- Over 3,500 people on low incomes, who weren't eligible for the equivalent national payments, benefited from our **£450 cost of living payments**.

- We provided £2.1 million through the city and district councils to **reduce council tax** bills and provide **additional housing support to people on low incomes**.

- We spent £3.5 million ensuring families of children entitled to free school meals received **support with food costs** during the school holidays.

- 9,622 people attended our **digital and information support sessions** in libraries, and library users clocked up over **87,000 hours of free access time** on library computers.

- We provided a £300,000 grant to advice agencies in the county to provide **debt and benefits advice** to people affected by the cost of living crisis.

- As a key partner in the Oxfordshire Migration Partnership - which includes local authority, health and voluntary and community sector partners - we **supported over 2,600 Ukrainian guests** staying in the county and helped **more than 100 Afghan citizens** settle into their own homes and communities.

- We developed a **£1.2 million employment investment programme** to support Ukrainians into work, with wider benefits created for other migrant groups.

- We signed a pledge to become a **council of sanctuary**, committing to provide a warm welcome for all new arrivals and support independent living for those staying in the county.

Fairer

Fairer

Local democracy

Our strategic priority

Play our part in a vibrant and participatory local democracy

Fairer

- We supported over **360 cabinet and cabinet member decisions** in 2023 compared to 250 in 2022.

- An **Education and Young People Overview and Scrutiny Committee** was established following a recommendation by the Future Council Governance Group. The first meeting of the new committee was held in January 2024.

- We completed the first three phases of the **Local Government Boundary Commission for England electoral review**, which is reviewing political boundaries across the county.

- Working with town and parish councils, we **co-developed a charter** to help shape how we can work together in partnership to support better service delivery and ensure thriving local democracy across the county.

- We launched an online **citizens' portal** to share our performance data with residents in a more accessible and engaging way.

- We introduced an **online budget simulator** for our 24/25 budget consultation, with over 1,300 people using it to weigh up choices, make trade-offs and have their say on where we should focus savings and spending.

- We launched a monthly **consultations e-newsletter** to provide updates about and invitations to participate in our consultations and surveys.

- We launched a **new look homepage for our website**, designed to help people find the information they need quickly and easily.

Local businesses and partners

Our strategic priority

Work with local businesses and partners for environmental, economic and social benefit

Fairer

- We successfully transitioned the **Oxfordshire Local Enterprise Partnership** (OxLEP) to the county council.

- As part of the Joint Oxfordshire resilience team, we distributed 1,342 community resilience bags to **make vulnerable households safer** and business continuity assessments to 513 small businesses to **help them prepare for emergencies**.

- As part of our work with the Oxfordshire Inclusive Economy Partnership, we supported the creation of an **anchor institution network**, which brings together large organisations to create a more equal and sustainable region.

- We created **over £1.9 million in social value** through our tendering activities to add value for local communities, from using local businesses in our supply chain to using local residents employed on local contracts.

- We launched **Heritage Search**, an online catalogue of more than 1 million of Oxfordshire's records, images and objects.

- Our trading standards team conducted over **1,790 interventions with Oxfordshire businesses**, providing advice and support, testing products and procedures. They also provided over **500 small businesses with quick reviews** to help improve their resilience.

- Our fire and rescue service completed **464 fire safety audits** of commercial premises and 692 fire safety building regulations consultations.

- We secured £3.8 million of government funding to help Oxfordshire **become part of a new 5G innovation region**. The money will be invested initially in two major 5G projects – East West Rail between Bicester and Bletchley, and Harwell Science and Innovation Campus.

Oxfordshire Announced as **5G Innovation Region** Today

Department for Science, Innovation & Technology

Health and wellbeing

Our strategic priority

Prioritise the health and wellbeing of residents

- Together with NHS and local authority partners and Healthwatch Oxfordshire, we developed a **health and wellbeing strategy for Oxfordshire**, working with a wide range of community groups and consulting over 1,000 residents.

- Our Good Food project worked with a retail marketing expert to develop relationships with convenience stores in priority areas to **provide healthier food options**.

- We delivered 18,506 **NHS health checks** across the county to those aged between 40 and 74.

- We distributed **39,000 condoms and 16,318 testing kits** to help prevent the spread of sexually transmitted infections.

FREE
VAPE STARTER KIT

"I SWAPPED FOR OLIVIA, 11 DAYS AGO"

Swap your cigarettes for vaping

stopforlife OXON

- Our specialist stop smoking service, Stop for Life Oxon, has supported around **1,000 people to quit smoking**, providing free behavioural support and quit aids.

- Our smoke free community fund supported five projects and shared £2,850 to support a range of **smoke free initiatives**.

- We trained 545 staff and volunteers to use the **Making Every Contact Count approach** when speaking to people about their health and wellbeing. Over 8,700 conversations using this approach took place in our libraries.

- We delivered **2,702 safe and well home visits** and installed over **1,400 alarms** (981 smoke alarms, 120 heat alarms and 313 carbon monoxide alarms).

- Our fire and rescue and trading standards teams **tested 769 electric blankets**, with 35.5 per cent identified as unsafe for use.

- We fitted 28 call blockers in residents' homes to **protect them from scam and nuisance calls**. The 206 units we have fitted to date have led to 194,879 calls being blocked, with estimated savings to residents, police, social care and the NHS of over £2.9 million.

- Our public health and trading standards team **restricted children's access to vapes**, visiting over 34 retailers and seizing over 4,600 non-compliant devices.

- In partnership with Oxfordshire Mind, we rolled out five mental health and suicide prevention training courses to 40 delegates to help **support the mental health and wellbeing of our residents**.

- Our trading standards officers saved, or recovered, over £194,000 for **victims of scams, doorstep crime and other frauds**, as well as reaching 3,478 people with preventative advice and support.

Healthier

Healthier

Carers and social care

Our strategic priority

Support carers and the social care system

Together with partners, we continued to make a positive impact with **The Oxfordshire Way** - supporting people to live healthy and independent lives in their own homes for as long as possible.

In the latest round of our community capacity grants, we awarded 92 grassroots projects funding of up to £20,000 to **help isolated people stay connected, healthy and active** in their community.

Progress in timely **adult social care assessments and reviews** achieved a 46 per cent reduction on April 2021 waiting times. The longest wait time for an assessment reduced by 56 per cent.

On behalf of our partners, we secured almost £470,000 through the Accelerating Reform Fund that will be used to **scale up existing work in adult social care** throughout the region.

We funded 86 small community enterprises, who support over 1,284 people to **stay independent in their own homes**.

Working with the people we support, we co-produced **three improvements to our community support services** – opening the Cheers M'Dears pub room and Ta Da! beauty room in Banbury, as well as the Glitz & Glam salon in Witney.

Cheers M'Dears

Ta Da!

We supported more people **to live in their local communities for longer**, arranging 1,764 packages of home care.

Our reablement service supported people being discharged directly home from hospital to regain their independence, with **78 per cent achieving full reablement**.

The first tenants moved into their newly developed, specially adapted home in Witney – the first of five properties for adults with additional needs to **help them live well within their own communities**.

Our customer service centre handled 26,271 inbound phone calls about adult social care, of which **87.7 per cent were resolved at first point of contact**.

Our partnership with the Care Workers' Charity supported over 900 care and support workers with grants to **support people in a caring job** to pay for the costs of starting work.

We published an **all age unpaid carers strategy**, which was co-designed with over 200 carers, and developed action plans with partners to improve the experience of unpaid carers across Oxfordshire.

With funding from the Department for Work and Pensions, we **improved work opportunities for people with a learning disability or autism**. 89 people have signed up to the programme of support in the last year and 18 people have already successfully secured paid employment.

With the help of government funding, we supported **43 care leavers who were at high risk of homelessness**.

Three care leavers are undertaking apprenticeships as youth support workers and cultural participation officers within our services.

We co-produced a **Care Leaver Survival Guide** jointly with children who have experience of Oxfordshire's care system, to help support young people preparing for adulthood and leaving care.

We supported **1,744 carers with a direct payment** to support their wellbeing.

Over 150,000 visits were made to **Live Well Oxfordshire**, our website offering information about activities, groups and organisations for adults with a variety of needs.

Healthier

Healthier

Children and young people

Our strategic priority

Create opportunities for children and young people to reach their full potential

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- Our **children's services were judged 'good'** following an inspection by Ofsted in February 2024. Our services were rated as good across all five areas of inspection criteria.

- Our **Glebelands assessment home was rated 'outstanding'** by Ofsted, while our children's homes The Moors and The Oaks retained their 'good' Ofsted rating following inspections.

- We **completed the phased transfers** (primary to secondary) for all 568 children with education, health and care plans **within the statutory time frame**.

- We approved £2.23 million to create **23 new places at Mabel Prichard Special School** in Oxford to increase quality local facilities and support for SEND children.

- We approved a £2.5 million programme of work to improve the infrastructure of **North Hinksey CE Primary School** and a £2.8 million programme of renovation to **Bloxham Church of England Primary School**.

- £14.4 million is being invested in a **new school in Didcot for children with special educational needs and disabilities** (SEND). The school, which has a projected opening date of September 2029, will have capacity to teach 120 children.

- An Oxfordshire **SEND Strategic Improvement and Assurance Board** was set up to drive the actions required to deliver better services for SEND children, young people and their families.

- Information and resources for SEND professionals and parents and carers were strengthened with the introduction of **e-newsletters, refreshed webpages and Q&A events**.

- Working with the BookTrust charity, our library service secured £181,489 to **support early speech and language development**, and we reached more than 90 per cent of babies with books and other resources.

- We set up a new healthy child and young person public health service, delivered by Oxford Health, to support all 4 year-olds in the county to be **ready for school**.

- Thanks to additional funding from the Department for Education's Employer Support Fund, we increased the number of **children and family social work apprenticeships** we offer from two to 10 a year.

- 7,784 children attended our **Junior Citizens Safety Centre** to find out how to keep themselves safe and respond effectively in the event of an emergency.

- We offered cycle training to 95 per cent of primary schools across the county, **delivering cycle training to over 6,100 children**.

Healthier

Awards

We won **best climate action and decarbonisation initiative** in the 2023 Association for Public Service Excellence Service Awards for our energy insights tool and energy flexibility trials, showing the crucial role local authorities can play in moving away from the use of fossil fuels.

Together with Oxford City Council we won the **Exemplary Contribution to Net Zero Award** at the UK National Transport Awards for our collaboration on the Oxford zero emission zone scheme.

We received a commendation in the sustainability category and the technology and innovation category at the **2023 Chartered Institute for Highways and Transportation Awards** for our zero emission zone scheme.

Together with our contractor Milestone Infrastructure, we were recognised in three categories of the **2023 Highways Awards** for our collaboration on the North Oxford Corridor improvement project, including winning the Environmental Sustainability Award for decarbonisation.

Our Libraries' Business and Intellectual Property Centre team won the Children's Award in the 2023 **National Libraries Connected Awards** for introducing hundreds of children and young people to entrepreneurship.

Our schools' catering team won a 2023 Association for Public Service Excellence Performance Network Award for **most improved performer in catering services**.

The house project from the care leavers' service won **Oxford Brookes University's Celebrating Excellence in Practice Education 2023 Award** for being an outstanding placement partner, supporting social work trainees to succeed.

We received a **bronze Carbon Literacy Organisation Award** for our training programme, which has delivered carbon literacy training to 200 employees and councillors.

We won a 2023 **Chartered Institute of Public Relations PRide Award** for the launch of our internal recognition programme.

Our apprenticeship team won the Oxfordshire Local Enterprise Partnership's **Large Apprenticeship Employer of the Year Award 2023** for our work in providing a high-quality apprenticeship experience.

Our visual impairment and access to greenspace project, funded by Natural England, won the 'Best example of research making an impact' at the 2024 **Outdoor Recreation Network Awards**.

We were shortlisted for communications campaign of the year in the **2023 LGC Awards** for a recruitment campaign for on-call fire fighters, which received 60 applications against a target of 18.

We were shortlisted for the **MJ Awards' innovation in children's and adults' services category** for our Cheers M'Dears pub room in Banbury, which provides a social space for members of our community support service.

Three of our social workers – Helen Barker, Katherine Elliott and Tatiana Lucena – won awards from the **British Association of Social Workers**.

The Oxfordshire Museum in Woodstock was nominated for the **Muddy Stilettos Best Family Attraction 2024**.

We were shortlisted for a **Comms 2.0 award for our smoking cessation communications campaign**, which resulted in a 46 per cent increase in visits to the Stop for Life website and a 42 per cent increase in referrals to the Stop for Life service.

Jamie Kavanagh, our senior policy officer for inequalities, won the **Freemen of Oxford Award for information and communication and technology** for his work on inclusion and diversity in data management.

Firefighter and LGBT+ champion Charlotte Stacey was awarded a **British Empire Medal** for her services to the community.

Will Pedley, one of our senior transport planners, won the **Transport Planning Society's Transport Planner of the Year 2023**.

Kath Hunt, our Youth Justice and Exploitation Manager, received a **Thames Valley Police Commendation** for her multi-agency work to prevent exploitation in one area of the county.

Alison Brookman, Assistant Team Manager and Violence Reduction Coordinator, was awarded the **Thames Valley Police Laycock Award for problem solving** to recognise her work responding to issues of serious violence and anti-social behaviour.

2023/24 in figures

We recorded **7,446** births and **6,494** deaths.

We conducted and registered **2,578** civil partnership and marriage ceremonies, and registered **532** religious marriages.

We spent over **£2m** repairing potholes, with more than **30,000** defects repaired.

94.59 per cent (6,613) of applicants were awarded their first choice of primary school in Oxfordshire for 2024/25.

88.24 per cent (6,492) of applicants were awarded their first choice of secondary school in Oxfordshire for 2024/25.

We currently have **300** apprentices on programmes across the council. Our apprenticeship achievement rate currently stands at **80 per cent**, exceeding the Department for Education's ambition of **67 per cent**.

We conferred British citizenship on **1,973** new citizens.

Our fire and rescue service attended **6,361** emergencies.

Our highways teams maintained **3,000** miles of road, **2,000** miles of footway, **1,200** bridges, **400,000** highway trees and **80,000** streetlights.

Our portable antiquities team, who help preserve and protect local heritage finds and treasures, saw a **25 per cent** increase in the recording of treasure cases.

1,909,185 people visited our libraries.

Our libraries loaned **3,613,485** books and other items.

We spent **£496,000** on refurbishing **15** of our libraries.

Performance and feedback

Performance summary

This summarises the progress we have made delivering against the activities, tasks and projects outlined in our strategic plan under each of the nine strategic priorities.

The bi-monthly business management and monitoring reports can be found here for further detail of achievements and action plans.

mycouncil.oxfordshire.gov.uk

Listening and learning

Throughout the year we provide opportunities to our residents to have their say. Whether through customer satisfaction surveys, consultations on our budget, new projects and services, talking to local business organisations or feedback through our website; we are keen to listen to what you like and what needs to be improved.

letstalk.oxfordshire.gov.uk

Let's Talk

On target/ Ahead of target
58

Slightly off target
10

Off target
8

Finance

What we spent on council services

In 2023/24 the council spent **£894.9m** on services – our gross expenditure budget. The chart below shows how we spent our budget on services in 2023/24.

51% Adult and children's social care
18% Education and learning
9% Highways and transport
7% Capital borrowing and other financial costs (eg contingency and reserves)
5% Public health improvement and prevention services
4% Waste disposal and recycling
4% Fire and rescue and community safety
2% Culture and customer experience

£894.9m Council services

+
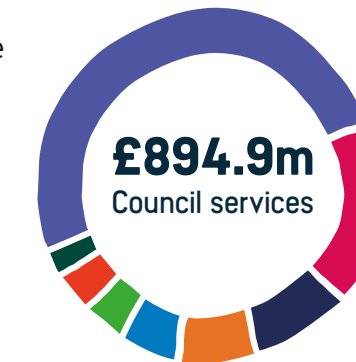
In addition we spent **£238.9m** on maintained schools.

Capital programme

In 2023/24, we spent **£175.9m** on capital projects which included investment in highway improvements, new school buildings, Zero Emission Bus Regional Area (ZEBRA) electric buses and energy efficient street lighting. This money can only be used for the purpose it has been given and cannot be allocated to day-to-day council spending.

Major infrastructure **£61.7m**
Highways asset management plan **£53.2m**
Pupil places plan **£36.8m**
Property strategy **£9.6m**
Funding passported to other bodies **£8.7m**
IT, digital and innovation strategy **£4.9m**
Vehicles and equipment **£1m**
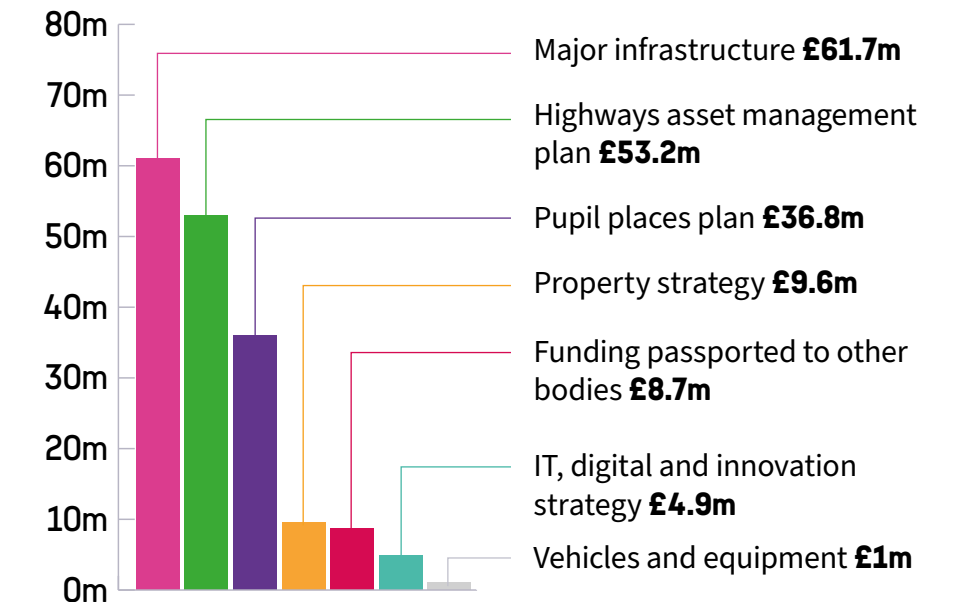
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Introduction

1. This annex sets out the final financial monitoring update for the 2023/24 financial year and is based on information from 1 April 2023 to 31 March 2024.

2. The budget for 2023/24 and Medium-Term Financial Strategy to 2025/26 was agreed by Council on 14 February 2023. £57m new funding to meet inflationary and demand pressures was included as part of the budget for 2023/24 along with £30m budget reductions. There was also funding for investments totalling £9.3m.

3. This is the final update for 2023/24 and sets out the final expenditure against the agreed budget as well as an update on the achievement of planned budget savings and investments.

4. The information in this report will be incorporated into the Council's Statement of Accounts for 2023/24. Both the draft and final Statement of Accounts will be published on the Council's website.

5. Under the Accounts and Audit Regulations 2015 regulations 9 and 15, the commencement period for the exercise of public rights to inspect the draft 2023/24 accounts and related documents, based on an account's completion date of 31 May 2024, should include the first 10 working days of June 2024, with inspection dates being between 1 June and 12 July 2024.

6. However, delays with the audit of the 2021/22 accounts and the impact of the outcome of consultation for back stop arrangements for the audit of the Statement of Accounts for 2022/23 has created challenges that have affected the council's ability to meet this deadline.

7. Work is in progress to consolidate the draft accounts for 2023/24 with an anticipated completion by the end of June 2024, following which the period for the exercise of public inspection will commence. A further notice will be published on the council's website in due course setting out the public inspection period.

8. The following additional information is provided to support the information in this Annex:

   Annex B – 1 (a) to (e) Detailed directorate positions 2023/24
   Annex B – 2 Virements to note
   Annex B – 3 Earmarked reserves
   Annex B – 4 Government grants
   Annex B – 5 General Balances

Overview of 2023/24 Expenditure & Funding

Directorate Budgets & Expenditure

9. The table below summarises the directorate expenditure compared to the final budget and shows the movement since the report to Cabinet in March 2024. At the end of 2023/24 there was a directorate overspend of £6.6m (1.1%).

Directorate Budgets	Final Net Budget	Total Spend	Year End Variance	Year End Variance	Variance Last Cabinet Reporting Month	Change in Variance
	£m	£m	£m	%	£m	£m
Adult Services	229.7	229.7	0.0	0.0%	0.0	0.0
Childrens' Services	172.3	180.0	7.7	4.5%	12.9	-5.2
Environment & Place	75.3	72.2	-3.2	-4.2%	-2.9	-0.3
Public Health	4.1	3.9	-0.2	-3.7%	0.0	-0.2
Community Safety	27.0	27.7	0.7	2.5%	0.4	0.3
Resources	73.3	74.9	1.5	2.1%	1.9	-0.4
Total Directorate Budgets	**581.8**	**588.4**	**6.6**	**1.1%**	**12.3**	**-5.7**

10. As explained in the Business Management & Monitoring Reports throughout the year, the final position for 2023/24 reflects the impact of financial risks which include inflation and demand pressures for Childrens' social care, as well as workforce shortages.

11. During the year there has been sustained management action to manage pressures across the council which have contributed to the position at year end. The on-going impact of increases in inflation and demand was considered through the Budget & Business Planning Process for 2024/25.

12. Adult Services expenditure was balanced to the budget at year end. Risks within the council elements of the pooled budgets have been managed by the service.

13. The overspend for Childrens' Services has reduced by £5.2m. This is mainly driven by a reduction in anticipated inflationary pressures on residential placements in the last quarter of the year in addition to measures taken by the service to reduce the need for children to go into a remain in care.

14. The underspend for Environment & Place has increased by £0.3m compared to the report to Cabinet in March 2024. The underspend reflects a reduction in energy costs from lower energy activity, a reduction in waste management costs and additional income from enforcement activity.

15. The overspend for Community Safety has increased by £0.3m mainly due to

additional staffing costs and a one-off payment made for a disabling injury/illness.

16. The overspend for Resources has reduced by £0.4m from the previously reported position, mainly due to vacancies in Communications, Strategy and Insight.

17. The final position reflects the achievement of planned savings in 2023/24. The table at paragraph 117 shows the planned savings and actual delivery for each directorate.

18. 73% of the budgeted savings of £10.2m which were not achieved as planned in 2022/23 have been delivered. 84% of the 2023/24 savings have been delivered and 16% of savings have not been delivered. Where relevant, savings that are not expected to be achieved on an on-going basis have been removed through the Budget & Business Planning Process for 2024/25.

19. The 2023/24 deficit compared to Dedicated Schools Grant (DSG) funding for High Needs is £14.7m. This is £3.6m lower than the £18.3m forecast deficit approved by Cabinet in May 2023. The CIPFA code of practice currently requires negative High Needs DSG balances to be held in an unusable reserve. The deficit would increase the cumulative negative High Needs DSG balance held in this reserve from £41.1m as at 31 March 2023 to £55.8m at 31 March 2024.

Directorate Financial Positions as at 31 March 2024

Adult Services

20. Adult Services expenditure was £229.7m with no variation to the final budget. This has remained unchanged from the forecast position reported to Cabinet in March 2024.

Service Area	Final Budget Mar-24 £m	Net Expenditure Mar-24 £m	Variance Mar-24 £m	Variance Jan-24 £m	Change Since Jan-24 £m
Adult Social Care	26.3	27.0	0.7	0.6	-0.2
Health, Education & Social Care Commissioning	5.4	4.8	-0.6	-0.6	0.1
Housing & Social Care Commissioning	1.4	1.4	0.0	0.0	0.0
Business Support Service	1.1	1.0	-0.1	-0.1	0.0
Pooled Budgets	195.5	195.5	0.0	1.0	0.1
Total Adult Services	**229.7**	**229.7**	**0.0**	**0.0**	**0.0**

21. The final position reflects an agreement on the sharing of costs for adults with Section 117 aftercare support under the Mental Health Act with the Buckinghamshire, Oxfordshire and Berkshire West Integrated Care Board, bringing the health and social care system funding more in line with other local authorities and care boards.

22. The balanced position is after the transfer of £0.5m to the Budget Priorities Reserve to fund commitments within the Live Well pooled budget including repairs and refurbishment costs of supported living units and respite properties plus associated development costs.

Pooled Budgets

Age Well Pooled Budget

23. The Age Well pool combines health and social care expenditure on care homes, activity relating to hospital avoidance and prevention and early support activities for older people.

24. Budgets within the pool have been managed on an aligned basis with the Integrated Care Board (ICB) for Buckinghamshire, Oxfordshire, and Berkshire West (BOB) following the agreement of the contributions and risk share arrangements for 2023/24.

25. The council elements of the Age Well pool overspent by £1.1m. Care Home activity has increased throughout the year; the number of placements has increased by 6% over a 12-month period.

26. The council's share of the Better Care Fund (BCF) that has been utilised within the pool is £29.4m. The 5.75% increase in funding compared to 2022/23 was used to support the cost of preventative services and BCF schemes as agreed within the BCF plan.

Live Well Pooled Budget

27. The Live Well pool supports a combination of health and social care needs for adults of working age with learning disabilities, acquired brain injury or mental health needs and adults with physical disabilities.

28. Budgets within the pool have been managed on an aligned basis with the Integrated Care Board (ICB) for Buckinghamshire, Oxfordshire, and Berkshire West (BOB) following the agreement of the contributions and risk share arrangements for 2023/24.

29. The residential element of the mental health Outcomes Based Contract (OBC) with Oxford Health Foundation NHS Trust (OHFT) and BOB ICB, is continuing to be shared equally between the ICB and the council, this agreement was extended to cover the Learning Disability cohort from the beginning of 2023/24.

30. The physical disability and the acquired brain injury budgets were managed on an aligned basis. Any pressure linked to the cost of people with mental health needs falling outside of the OBC were to be split equally after the first £0.2m which was the responsibility of the council.

31. The council elements of the Live Well pool underspent by £1.1m after taking account of the following:

- A £3.0m underspend within the Higher Functioning Autism (HFA), Learning Disabilities and Acquired Brain Injury areas of the pool. This is as a result of the residential element of the S117 aftercare which is shared equally between both the council and BOB ICB where this was previously all charged to the council. There was also a lower level of HFA activity than budgeted for.

- A £1.9m overspend within Physical Disabilities related to an increase in demand for both care homes and home support during late 2022/23 creating an on-going pressure in 2023/24. Year on year, there has been an 8% increase in care home placements (10 placements) and a 13% increase in the number of homecare hours delivered per week, with the number of home support clients supported increasing by 10%.

Non-Pool Services
32. There was a breakeven position for non-pool services.

Other Services
33. An overspend of £0.7m is linked to increased costs of the provider support services team where additional investment to target improvements in the debt management and recovery team has resulted in debts being managed more effectively. Continuing into 2024/25 the aim is to continue to bring down the level of bad debt held within the council.

34. An underspend of £0.7m within the Health, Education and Social Care (HESC) and the Business Support Service was due to vacant posts held throughout the year.

Reserves
35. Earmarked reserves held by the directorate as at 31 March 2024 totalled £2.7m and have decreased by £0.4m during the financial year.

Ringfenced Grants
36. As set out in Annex B-4, ring-fenced government grants received by Adult Services in 2023/24 totalled £21.4m.

37. The Improved Better Care Fund Grant was £10.7m, with no change since 2022/23. The conditions attached to the grant funding required it to be used for the purposes of meeting adult social care needs, including contributing to the stabilisation of local care markets and supporting the NHS is addressing pressures such as delayed discharges.

38. The Market Sustainability and Improvement Fund was £5.4m. This was used to enhance fee uplifts for care providers in 2023/24 in line with the terms of the grant, and to maintain uplifts from 2022/23 funded through the Market Sustainability and Fair Cost of Care grant which now forms part of this grant.

39. The Market Sustainability and Improvement Workforce Fund totalled £3.5m and has been used to grow social care capacity through increasing social care workforce capacity and retention, reducing social care waiting times and

increasing fee rates paid to social care providers.

40. The Adult Social Care Discharge Fund totalling £1.5m has been used to provide interventions that improve discharge of patients from hospital to the most appropriate location for their ongoing care.

41. Oxfordshire received £0.3m from the Adult Social Care Apprenticeship Fund in February 2024. This will used in 2024/25 with the aim of increasing social work capacity within adult social care. This has been transferred into the grants and contribution reserve.

Virements

42. Virements to note transacted by the end of March 2024 reflect the movement of funding held in reserve into the pooled budgets plus further reallocations of budgets relating to price increases within Adult Social Care.

Childrens' Services

43. Childrens' Services overspent by £7.7m against a budget of £172.0m. The final position has improved by £5.2m compared to the January forecast. In addition, there was an overspend of £14.7m on High Needs Dedicated Schools Grant.

44. As reported throughout the year the underlying pressures in Childrens' Services which were reflected in the overspend for 2022/23 reported to Cabinet in June 2023, have remained a significant challenge in 2023/24. These pressures were driven by a combination of care placements costs, staffing, particularly the reliance on agency staff to cover vacancies, and Home to School Transport for pupils with Special Educational Needs.

Service Area	Final Budget Mar-24 £m	Net Expenditure Mar-24 £m	Variance Mar-24 £m	Variance Jan-24 £m	Change Since Jan-24 £m
Education & Learning	40.1	43.3	3.2	4.2	-1.0
Schools[1]	0.2	0.2	0.0	0.0	0.0
Subtotal Education	**40.3**	**43.5**	**3.2**	**4.2**	**-1.0**
Early Help, Front Door & Social Care	76.0	76.1	0.1	2.9	-2.7
Provider Services & Safeguarding	44.8	48.7	4.0	5.2	-1.3
Childrens' Services Central Costs	11.2	11.7	0.4	0.6	-0.2
Subtotal Childrens' Social Care	**132.0**	**136.5**	**4.5**	**8.7**	**-4.2**
Total Children's Services	**172.3**	**180.0**	**7.7**	**12.9**	**-5.2**

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[1] *Maintained Schools are funded by Dedicated Schools Grant

Dedicated Schools Grant	Final Budget Mar-24 £m	Net Expenditure Mar-24 £m	Variance Mar-24 £m	Variance Jan-24 £m	Change Since Jan-24 £m
Schools DSG	129.5	129.2	-0.3	0.0	-0.3
High Needs DSG	84.7	99.4	14.7	21.2	-6.5
Early Years DSG	45.2	41.9	-3.2	0.0	-3.2
Central DSG	5.0	5.2	0.3	0.0	0.3
Total DSG Funded Expenditure	**264.3**	**275.7**	**11.4²**	**21.2**	**-9.8**

Education & Learning

45. Education & Learning overspent by £3.2m against a budget of £40.3m. This was primarily a result of pressures within Home to School Transport and Management.

46. The £3.1m overspend for Home to School transport is £0.5m lower than the forecast reported to Cabinet in March 2024. The overspend is mainly driven by the Special Educational Needs (SEN) transport service which overspent by £4.1m, offset by a £1m underspend within mainstream school transport. This reflects higher activity in the service than was budgeted for and the impact of rolling annual tenders for bus routes. In addition, the service the service was unable to deliver planned savings of £1.0m.

Childrens' Social Care

47. Childrens' Social Care overspent by £4.5m against a budget of £132.0m. The overspend was primarily driven by a combination of care placement costs and reliance on agency staff to cover vacancies.

48. This reflects a combination of:

- The on-going effect of the overspend in 2022/23. Because activity increased in the last quarter of the financial year the on-going effect was not fully anticipated in the Budget & Business Planning process for 2023/24.

- Changes in practice, interventions to prevent unnecessary referrals and reduce the number and cost of children's care and support has made a significant impact on spend in the financial year and reduced the overspend at year end.

- Financial volatility in the market for care together with the impact of inflation and shortages in local capacity reduced the ability to make an impact on spend in the short-term.

49. The drivers of the pressures remained the same as in 2022/23 and included:

- Continued workload pressure, increased vacancies and recruitment difficulties within front-line services including Family Solutions Plus, Front Door and Children We Care For Teams.

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² There is also a movement on the unusable reserve for the new schools fund of £0.6m

- Though the number of children in care has reduced, this has been offset by increases in underlying unit cost rates especially the growing number of very complex cases, although significant action has been taken in the year to manage these.

50. The most significant variances include:

- Children with Disabilities: £1.8m overspend within placement budgets due to a combination of an increased and more complex level of care being required and higher rates. The improvement in the overspend by £0.7m compared to the previously forecast position is due to lower activity than previously forecast for the final quarter of the year (£0.6m) and changes to care packages, including recharges from SEN (£0.1m).

- High Cost and Unregistered Placements: £3.5m overspend. The reduction of £2.0m since the last report due to is due to:

   - Assumptions about inflation requirements for residential placements which were not required due to careful management of the market and a reduction in inflationary pressures during the later part of the year.
   - A reduction in suspended placement costs, new resource panel searches. Backdated costs were lower than anticipated due to on-going activity to manage demand and cost.
   - Oxfordshire's share of the Adopt Thames Valley underspend, which had not been included in the previous forecast.

- Family Solutions Plus (FSP): £0.5m overspend mainly due to continued dependence on high-cost agency staff to cover vacancies due to shortages of staff in the marketplace. The improvement in the overspend by £0.4m compared to the previously reported position was a result of a reduction in staffing spend in the FSP Team, as well as previously prudent forecasts across the service.

- The pressures have been mitigated to some extent by:

   - Substantial underspends on staffing.
   - Underlying reductions in legal and transport costs
   - An increase in NHS Health partner joint funding for Continuing Healthcare and Mental Health (Section 117)

Childrens' Social Care: Pressures, Drivers, and Action Plan

51. Given the scale of the £19.1m overspend for Childrens' Social Care in 2022/23 the service undertook a comprehensive review of its vision and strategy in 2023/24. Plans for reducing expenditure, as well as an adjustment for risk, were considered through the Budget & Business Planning process for 2024/25.

52. During 2023/24 the service implemented organisational, governance and business process controls and market management actions to address the underlying pressures. These included:

- Continued scrutiny of spend by senior management and the leadership

team.

- Streamlining of referrals at the 'front door' (MASH) - revising thresholds & practices.
- The Family Solutions Plus (FSP) teams continue to work to reduce the backlog of assessments and intervention measures.
- Development of a robust recruitment and retention policy.
- Work to reduce the number of children needing care and tracking those where care placements are due to cease.
- Ongoing reduction in the number of children living in high-cost placements.
- Brokerage action plan to ensure timely, suitable, cost-effective placements are sourced.
- A 'LEAN' review of the placement process and identification of efficiencies.

53. Evidence that the actions had an impact is reflected in the number of Children We Care For (CWCF).

	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Jan 2024	Feb 2024	Mar 2024
Oxfordshire born children	778	755	735	709	677	651	637	632	624
Disabled Children	61	62	58	56	51	50	49	50	49
Subtotal	**839**	**817**	**793**	**765**	**728**	**701**	**686**	**682**	**673**
Unaccompanied	69	73	108	100	94	108	93	96	95
Total	**908**	**890**	**901**	**865**	**822**	**809**	**779**	**778**	**768**

54. The downward trend in the number of CWCF was due to the above actions and in particular the use of strengths based proportionate assessment, resulting in a greater number of families and their children being supported in their own homes and fewer children becoming children we care for.

55. In addition, emphasis was also being placed on permanence planning and finding other more suitable (and usually more cost-effective) placements, including re-unification to the family home and adoption.

Childrens' Services Central Costs

56. An overspend of £0.4m relates to a claim for historic legal fees (£0.2m) and a pressure relating to significant growth in social care complaint cases dealt with by the Customer Service Centre (£0.2m) but recharged to Children's Services.

Dedicated Schools Grant (DSG)

57. Variations against the Dedicated Schools Grant blocks are summarised in the table below.

Summary of DSG funding	2023/24 Budget £m	2023/24 Outturn £m	Variance March 2024 £m
Schools block	129.5	129.2	-0.3
Central Services Schools block	4.9	5.2	0.3
High Needs block	84.7	99.4	14.7
Early Years block	45.2	41.9	-3.2
Total	**264.3**	**275.7**	**11.4**[3]

58. The majority of the variance relates to High Needs DSG with an in-year deficit of £14.7m. This is £3.6m lower than the £18.3m forecast deficit approved by Cabinet in May 2023. In line with national guidance the overspend on High Needs DSG will be transferred to an unusable deficit reserve. The deficit would increase the cumulative negative High Needs DSG balance held in this reserve from £41.1m as at 31 March 2023 to £55.8m at 31 March 2024

59. Some of the key issues impacting on High Needs DSG spend in 2023/24 were the cost of placements from September 2023, tribunal challenges to placement decisions, and the impact of inflation on providers' fees.

60. The overspend on the Central Block DSG relates mainly to higher staffing costs where interims have been required during the year, although the overspend is equal to the cost of accumulated underspends on this block.

62. The underspend on the Schools Block relates to the inclusion of a grant received for schools in financial difficulty.

63. Early Years DSG is underspent due to lower than anticipated hours of early years education being funded.

64. The Chancellor announced significant changes to childcare arrangements in the Spring Budget 2023. This included an uplift to rates payable for the period September 2023 to March 2024. In 2023/24 the funding for this was received via a specific grant but this will be subsumed within DSG from April 2024. The provisional grant is in the region of £3.0m, and the exact amount will not be known in June 2024, after the schools' census return. The council will need to pass the grant to providers in full.

Investments

65. The following budget investment was agreed by Council in February 2023 as part of the budget for 2023/24:

- £0.5m on-going funding to support additional capacity within the Special Educational Needs Team to improve service delivery was fully utilised in 2023/24.

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[3] There is also a movement on the unusable reserve for the new schools fund of £0.6m

Reserves

66. Total directorate earmarked reserves are £18.0m and have decreased by £0.6m during the financial year. £13.0m of the total relates to school balances which have increased by £0.1m in the year. The unusable DSG reserve is holding a deficit of £45.6m after taking account of the 2023/24 deficit of £11.4m and a movement on the unusable reserve for the new schools fund of £0.6m.

67. £4.5m of the total held relates to ringfenced grants that are expected to be spent in future years.

Grants

68. As set out in Annex B-4, ring-fenced government grants received by the directorate in 2023/24 totalled £303.4m.

Environment & Place

69. Environment & Place underspent by £3.2m against a budget of £75.3m. The final position has improved by £0.3m compared to the January forecast.

Service Area	Final Budget Mar-24 £m	Net Expenditure Mar-24 £m	Variance Mar-24 £m	Variance Jan-24 £m	Change Since Jan-24 £m
Transport& Infrastructure	13.6	12.4	-1.2	-1.3	0.1
Planning, Environment & Climate Change	37.6	37.2	-0.4	-0.6	0.2
Highways & Operations	21.5	19.7	-1.8	-1.1	-0.7
Directorate Support	2.6	2.8	+0.2	+0.1	0.1
Total Environment & Place	**75.3**	**72.1**	**-3.2**	**-2.9**	**-0.3**

Transport & Infrastructure

70. Transport & Infrastructure, which underspent by £1.2m, comprises Transport Policy, Place Making and Infrastructure Delivery.

71. There was a £0.5m underspend on community transport initiatives. As set out in paragraph 89 more time is required to deliver on the on-going investment of £1.2m agreed in February 2023 due to a greater time required to plan, identify and work with providers.

72. The Infrastructure Delivery and Place Making service areas underspent by £0.5m as a result of the allocation of funding to support Programme Management Office costs and other specialist functions needed to support the delivery of the Major Infrastructure capital programme.

73. There was a £0.1m underspend on senior management costs.

74. Placemaking services broke even at year end.

Planning, Environment & Climate change

75. The Planning, Environment & Climate change service area is made up of Strategic Planning, Climate Change and Environment & Circular economy. The service area underspent by £0.5m.

76. Strategic Planning achieved a breakeven position.

77. Climate Change underspent by £0.2m due to vacancies within the team. The service anticipates being fully resourced in the next financial year.

78. Environment & Circular Economy underspent by £0.2m.

79. Waste Management overspent by £0.1m as a result of a mix of factors associated with contract costs, gate fees and transportation costs. Tonnages managed by the Energy Recovery Facility (ERF) were higher than budgeted due to more waste going through to the ERF stream rather than Recycling/Landfill. Kerbside residual waste and recycling/composting waste tonnages were lower than budgeted. Although, waste tonnages overall were less than those budgeted for, the cost of the additional tonnages managed by the ERF offset the changes in landfill and recycling activity. The table below summarises budgeted and actual waste activity.

Waste Stream	Budget				Outturn			
	Annual	Tonnage		Price/ Tonne	Annual	Tonnage		Price/ Tonne
	£m	K'Tonnes	%	£	£m	K'Tonnes	%	£
Recycling/ Composting	8.155	158	58%	51.49	7.728	151	56%	51.04
ERF	15.392	104	38%	147.90	16.245	110	41%	148.93
Landfill	1.564	9	4%	175.19	1.122	7	3%	164.37
Total	**25.111**	**271**	**100%**	**92.66**	**25.214**	**268**	**100%**	**94.61**

*Please note that budget and outturn figures are rounded to the nearest 1000

80. A pressure of £0.2m in Countryside Operations was due to additional work associated with tree services in Oxford. This pressure has been mitigated through working with Oxford City partners by moving the works schedule to a reactive programme to reduce the level of spend. The service pressure has been offset through the underspend of £0.6m in Environment Strategy service, due to

part delivery of the Lead Local Flood Alliance initiative investment. It is anticipated that with the infrastructure in place, the full effect of the investment will be achieved in 2024/25 (see paragraph 89).

Highways & Operations

81. Highways & Operations underspent by £1.8m due to an over achievement of income through enforcement in Network Co-ordination and a reduction in energy prices and costs.

82. The Highway Maintenance service underspent by £1.0m. This reflects a 38% reduction in energy consumption for Street lighting as a result of 94% of the lamps now having been converted to efficient LED units through the LED replacement programme. In addition to the reduction in consumption, energy for street lighting is obtained through Crown Commercial Services. A price update received during the year set out a more favourable energy price per kilowatt, £0.256 lower than assumed when the budget was set. The graph below shows an approximately 50% reduction in energy usage in 2023/24 compared to 2021/22:

kWh Consumption
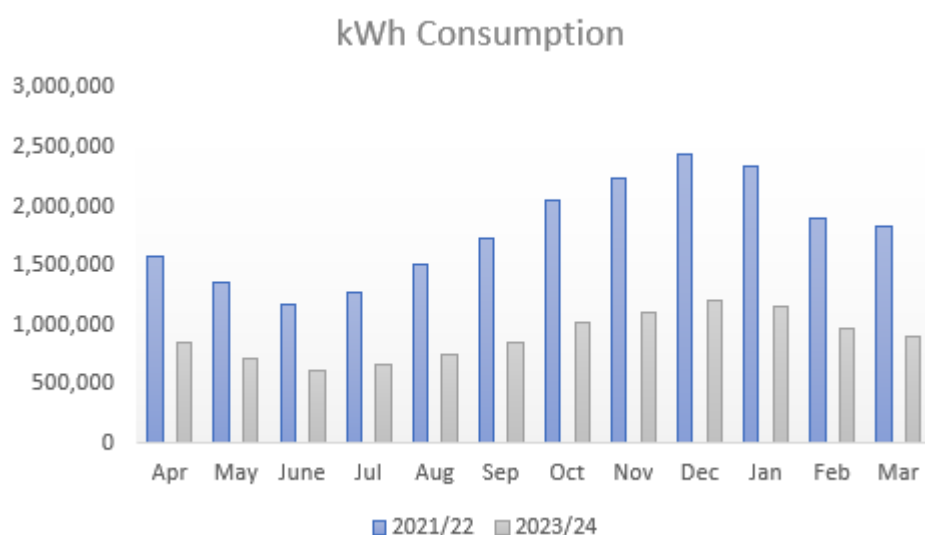
83. There was an underspend on highway operations contract costs due to inflation and material costs returning more in line with expected levels faster than anticipated though concern about volatility of costs remained throughout the year. This underspend was in part offset through a significant increase in the number highway defects throughout the year that were critical to repair and the need to deploy additional personnel to manage these.

Month	Defects 2022/23	Defects 2023/24	% Increase
April	3,320	4,143	24.8%
May	2,927	4,944	68.9%
June	2,212	4,695	112.2%
July	1,979	4,134	108.9%
August	1,888	2,553	35.1%
September	1,715	2,363	37.8%
October	1,650	2,927	77.4%
November	1,980	3,088	56.0%
December	1,840	2,837	54.1%
January	3,057	3,574	16.9%
February	3,023	3,881	28.38%
March	3,839	4,290	11.74%

84. The increase in the number of defects was driven by the impact of bad weather earlier in the year on roads that were already in a deteriorated condition and is consistent with the increase seen nationally.

85. The increase in defect numbers and the cost increase of associated repairs has been managed within the service area budgets through a reduction in other operational spend where possible.

86. Network Management underspent by £1.6m. A greater level of income was received than expected predominantly through street works (permit fees and enforcement), as well as a substantial 'late penalty' payment received in March relating to a utility operator fine. The greater levels of income were mainly attributable to compliance issues which are being robustly enforced, and as such are harder to forecast.

87. Supported transport overspent by £0.6m as a result of savings of £0.4m from 2022/23 plus a further saving of £0.2m in 2023/24 that have not been delivered. The on-going impact has been removed through the Budget & Business Planning Process for 2024/25.

Directorate Support

88. The Directorate Support service area overspent by £0.2m due to consultancy fees in respect of the Housing Infrastructure Fund (HIF) project review and the non-achievement of staffing savings.

Investments

89. The following budget investments were agreed by Council in February 2023 as part of the budget for 2023/24:

- On-going investment of £1.2m in <u>Community Transport Initiatives</u>: Countywide Community Transport Initiatives investment of £1.2m enabled the Council to provide a community transport grant scheme and provide new funding for rural transport services. In total, £0.7m was spent in the financial year 2023/24. The community transport grant scheme element was slightly overspent due to the high quality of applications. The rural transport element was significantly underspent because of the time needed to consult, design, tender and mobilise new routes – most services commenced in November 2023, with the final new route due to start in July 2024.

- <u>Park and Ride Joint Ticketing</u>: On-going funding of £0.5m was used to support the continuation of combined ticketing for parking and return bus travel in Oxford in 2023/23. The on-going funding is being used to support joint ticketing arrangements for 2024/25 as agreed with Oxford City Council.

- <u>Further Development of School Streets (Phase 2)</u>: £0.5m one - off funding from the Budget Priorities Reserve has been used to fund Automatic Number Plate Recognition cameras, signage, air quality sensors and traffic monitoring required for the implementation of a further four school streets in Oxford and one in Didcot.

- £1.0m one-off funding from the Budget Priorities Reserve was used to fund <u>improvements to existing highways, cycle-paths and pavements in Oxfordshire</u>. Works have been carried out countywide and have been co-ordinated with other works programmes / priority areas to maximise the impact / benefit. Examples include extensive refurbishment of the Marston Cycle Path in Oxford City whilst the route was closed to repair the University Parks Footbridges. Sites within or bordering Local Cycling and Walking Infrastructure Plan (LCWIP) areas, such as Abingdon, have been prioritised to support the LCWIP outcomes.

- Following work to agree a joint plan with Children's Services, £0.3m on-going funding to improve <u>Childrens' Transport Options</u> this will be utilised from 2024/25.

- <u>Improvements to travel information</u>: Initial outputs will be a suite of bus information provision, including online and printed with potential expansion to cycle/walking routes in 2024/25. £0.06m was spent in 2023/24, with the full £0.1m expected to be spent from 2024/25.

- <u>Mobility Hubs</u> (£1.5m funding over three years): Pilot locations have been identified and it is anticipated that the schemes, which will include sites at Benson Marina and Carterton Town Centre, will be designed and procured in 2024/25 with delivery in 2025/26. A mobility hub brand will be developed and

linked to wider sustainable transport network ambitions.

- Flooding and Drainage: £0.6m on-going funding was agreed for tackling the worst areas prone to flooding & drainage. There have been some significant delays in utilising the £0.6m investment, primarily due to lack of an existing mechanism for delivering the work on the ground, flooding issues with some areas being complex in relation to landownership and asset ownership. Furthermore, it took significant time to recruit a Project manager, who is now in post to deliver the investment in a longer term, to ensure the most effective us is made of the funding available. The additional funds in year held to fund identification of projects through engagement with residents, Members, Districts, Town and Parish Councils. Some of the funding have been utilised to deliver the projects through County's Highways team and District councils.

- Resource to Develop Freight Strategy (£0.06m on-going funding): The Freight Technical Lead has been in post since April 2024 and will lead on the implementation of the Freight and Logistics Strategy.

- Further work to develop Rail Studies (£0.1m one - off funding): £0.04m was spent in 2023/24 and the outline business case for Wantage and Grove Station is expected to be completed in the first quarter of 2024/25.

Grants

90. As set out in Annex B-4, ring-fenced government grants received by the directorate in 2023/24 totalled £4.7m. Within the year the directorate received £4.0m of grant funding from various central government bodies including Department for Transport, Department for Environment, Food and Rural Affairs and Homes England, compared to £1.8m received in 2022/23.

Reserves

91. Total directorate earmarked reserves as at 31 March 2024 were £15.7m, an increase of £2.8m in the financial year. The increase is made up of £0.7 income relating to the Zero Emission Zone and a £1.6m increase in the Parking Account.

92. £0.5m reserve funding has been used during the year primarily to support public transport initiatives and growth deal partnership work undertaken throughout the year.

Public Health and Community Safety

93. Public Health and Community Safety overspent by £0.5m against a combined budget of £31.1m.

Service Area	Latest Budget Mar-24 £m	Net Expenditure Mar-24 £m	Variance Mar-24 £m	Variance Jan-24 £m	Change Since Jan-24 £m
Public Health Functions	37.1	36.7	-0.5	0.0	-0.5
Public Health Recharges	0.6	0.6	0.0	0.0	0.0
Grant Income	-33.6	-33.6	0.0	0.0	0.0
Transfer to Public Health Reserve	0.0	0.3	0.3	0.0	0.3
Total Public Health	**4.1**	**4.0**	**-0.2**	**0.0**	**-0.2**
Total Community Safety	**27.0**	**27.7**	**0.7**	**0.4**	**0.3**
Total Public Health & Community Safety	**31.1**	**31.6**	**0.5**	**0.4**	**0.1**

Public Health

94. There was a £0.5m underspend on Public Health functions. £0.3m of this has been transferred to the Public Health reserve at year end. The underspend was made up of:

- £0.1m overspend on the substance misuse service due to increased activity in the residential rehabilitation and detoxification treatment service which improves outcomes for people with complex treatment needs.
- £0.1m overspend on National Health Service health checks because of the high level of activity in primary care which is in line with the national trend post COVID-19; offset by
- £0.2m underspend within the obesity service as service delivery changes will not take place until 2024/25.
- £0.1m underspend on Sexual health services linked to activity levels.
- £0.2m underspend on staffing, linked to in-year delays in recruiting to vacant roles.
- £0.1m underspend relating to multi-year projects across healthy place shaping and wider determinants, there is a commitment for this to be spent in 2024/25.
- £0.1m underspend within other public health services due to delayed implementation of access to nature programmes and the change in estimated costs of Better Housing Better Health work.

Community Safety

95. Community Safety overspent by £0.7m as a result of:

- The reallocation of budgeted agency staffing savings of £0.2m which it was not possible to achieve by the end of the year.

- A one-off payment of £0.1m made for a disabling injury/illness.
- £0.4m additional staff costs linked to the Botley Road closure in Oxford and the Rewley Road development.
- £0.1m linked to the impact of inflation on the cost of maintaining the service's fleet of vehicles and an increase in training costs of new recruits following staff leaving unexpectedly.
- These overspends were offset by an underspend of £0.1m within Trading Standards. This related to delays in recruitment, and the receipt of unexpected one-off income.

Ringfenced Government Grants

96. The ringfenced Public Health grant totalled £33.6m in 2023/24 and increased by £1.0m compared to 2022/23. The grant was used to support Public Health activities throughout 2023/24 with £0.3m unutilised funding transferred to the Grants and Contributions Reserve for use in future years.

97. The council received £1.4m in relation to the Firefighter's Pension Fund Grant, £0.3m Fire Protection Uplift Grant and £0.1m in total from the New Dimensions, Pension Administration and COVID-19 special grants.
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Use of Un-ringfenced Government Grant Funding

98. Un-ringfenced grants held centrally and agreed to be used to support expenditure budgets within Public Health and Community Safety in 2023/24 were:

- £1.2m Domestic Abuse Duty Grant supporting the provision of accommodation-based support to victims of domestic abuse and their children.
- £0.6m Substance Misuse Treatment & Recovery Housing Grant being used to deliver the Government's aim that by 2024/25 there will be more people recovering from addiction in stable and secure housing.
- £0.6m Supplementary Substance Misuse Treatment and Recovery grant. 2023/24 was the second year of a three-year scheme where the Office for Health Improvement and Disparities (OHID) worked alongside other government departments to support a process of investment in a whole system approach to tackling illicit drug use, including enforcement, diversion and treatment and recovery interventions.
- £0.1m Supplementary Substance Misuse Inpatient Detox and Rehabilitation.
- £1.2m Rough Sleeping Drug and Alcohol Grant used to provide specialist support for rough sleepers and those at risk.
- £0.1m Rough Sleeping Strategy – Care Leavers
- £0.1m Firelink Grant – This was a 40% reduction from the previous year and this grant will continue to reduce by 20% in each of the next four years.

Reserves

99. Total directorate earmarked reserves as at 31 March 2024 were £4.5m, an increase of £0.4m in the financial year.

100. Public Health funding held in the Grants and Contributions Reserve totalled £4.5m as at 31 March 2024. £1.8m is forecast to be spent in 2024/25, £1.2m in 2025/26 and £0.5m in 2026/27, and £0.4m in 2027/28, leaving a balance of £0.7m.

Virements

101. There are no virements to note.

Resources and Law & Governance

102. The services within Resources overspent by £1.5m (1.9%) against a budget of £73.3m. This is a reduction of £0.4m from the forecast reported to Cabinet in March 2024.

Service Area	Final Budget Mar-24 £m	Net Expenditure Mar-24 £m	Variance Mar-24 £m	Variance Jan-24 £m	Change Since Jan-24 £m
Corporate Services	2.3	2.3	0.0	0.0	0.0
Human Resources & Organisational Development	4.8	4.2	-0.6	-0.5	-0.1
Communications, Strategy & Insight	3.5	3.4	-0.1	0.0	0.0
IT, Innovation & Digital	10.5	11.1	0.6	0.6	0.0
Culture & Customer Experience	12.7	13.2	0.4	0.5	-0.1
Finance & Procurement	8.8	9.3	0.5	0.5	0.0
Property, Investment & Facilities Management	19.7	20.1	0.4	0.4	0.0
Law & Governance	8.0	8.3	0.3	0.5	-0.2
Delivery & Partnership	3.0	3.0	0.0	0.0	0.0
Total Resources	**73.3**	**74.9**	**1.5**	**1.9**	**-0.4**

103. **Corporate Services** achieved a breakeven position.

104. **Human Resources & Organisational Development (HR&OD)** underspent by £0.6m due to delays in recruitment.

105. **Communications, Strategy & Insight** underspent by £0.1m due to a number of vacancies in the team.

106. **IT, Innovation & Digital** overspent by £0.6m, after taking account of the non-achievement of cross directorate savings agreed as part of the 2023/24 budget.

107. **Culture and Customer Experience** overspent by £0.4m. This is mainly in the Coroner's Service where the appointment of an Area Coroner has created an in-year pressure and the demand for coronial activity continues to increase year on year. There are also pressures in the Customer Service Centre where firm savings have not yet been identified in the corporate customer service consolidation programme. Additionally, increased income in Music Services has

not materialised and the re-allocation of staffing savings has also contributed to the overspend. Work continues to ensure that the Music Services and Registration Services are able to maximise their income opportunities to meet customer demand.

108. **Finance and Procurement** overspent by £0.5m due to the cost of agency staff being utilised to cover hard to fill vacancies, and an increase in staff costs following a job evaluation review.

109. **Property Services** overspent by £0.4m due to unexpected reactive repairs and maintenance. The School Catering service is overspent due to inflationary pressures, but this is partially mitigated by savings in other areas.

110. **Law and Governance** overspent by £0.3m, a reduction of £0.2m from previous report due to receipt of additional income. The overspend was due to the implementation of new structures in Governance and Legal Services resulting in higher locum costs in Legal Services.

111. **Delivery & Partnership** includes the delivery of cost-of-living measures and the council's migration and asylum programmes, including Homes for Ukraine. The budget is mainly funded from earmarked reserves and specific government grants and has achieved a break-even position.

Investments

112. The following budget investments were agreed by Council in February 2023 as part of the budget for 2023/24:

- Councillor Priority Fund: During 2023/23 each councillor has been allocated £15,000 to be spent by 31 March 2025.   £0.3m had been spent as at 31 March 2024 with the remaining funding of £0.7m held in the Budget Priorities Reserve for use in 2024/25.

- Community Hubs: The pilot hub will bring together a range of council and partner services in a single location in Banbury, driven by community need and engagement. This will inform a project pipeline and business case for the roll-out of further community hubs in Oxfordshire. £0.1m of £0.5m one - off funding had been spent as at 31 March 2024. The remaining £0.4m has been held in the Budget Priorities reserve for use in 2024/25.

- Business and Intellectual Property Centre: £0.2m one-off funding from the Budget Priority Reserve enabled the continuation of the BIPC service for 2023/24 while action to seek new funding streams for 2024/25 and onwards was underway. The full £0.2m has been spent in 2023/24. As no on-going funding has been identified, this service will close in June 2024.

- <u>Council Tax Support Schemes/Cost of Living Measures</u> (£2.3m one – off funding). £1.6m has been passed to the City and District Councils to support Council Tax Discounts and additional Discretionary Housing Payments. £0.3m has been used to support Voluntary & Community Sector Advisory Services, £0.2m on extending accelerated Better Housing Better Health programme, and £0.2m on administration and evaluation

Reserves

113. Total directorate earmarked reserves were £22.8m as at 31 March 2024 and have decreased by £0.4m during the financial year. £11.7m of the total relates to Homes for Ukraine Grant that is expected to be used in future years.

Grants

114. As set out in Annex B-4, ring-fenced government grants received by the directorate in 2023/24 total £9.3m and included further Homes for Ukraine Grant for new arrivals during the year.

<u>Medium Term Financial Strategy Savings</u>

115. After taking account of new and previously agreed savings the 2023/24 budget included planned directorate savings of £28.2m.

116. £10.2m of the 2022/23 savings were not achieved as planned in the last financial year. 73% of these savings have now been delivered, 27% have not been delivered.

117. 84% of the savings agreed as part of the 2023/24 budget have been delivered and 16% have not been delivered.

	2023/24 Planned Savings £m	Savings Delivered £m	2022/23 Savings delivered in 2023/24 £m	Delivery of 2022/23 Savings In 2023/24 £m
Adult Services	-18.4	-17.9	-4.0	-3.6
Childrens' Services	-3.9	-1.8	-1.9	0.0
Environment & Place	-1.6	-1.2	-2.3	-1.9
Community Safety	-0.4	-0.2	0.0	0.0
Resources & Cross Directorate	-3.9	-2.5	-2.0	-1.9
TOTAL	**-28.2**	**-23.7**	**-10.2**	**-7.4**
TOTAL DELIVERED		**84%**		**73%**

<u>Adult Services</u>
118. The 2023/24 budget included planned savings of £18.4m. 97% of these

savings have been delivered.

119. Undeliverable savings include reductions in the cost of vehicles used by council services expected to be achieved through the "One Fleet" Strategy and those which relate to managing demand, particularly in care homes.

120. The £0.3m share of the £1.5m budgeted reduction in agency costs reallocated to Adult Services during the year was delivered.

121. £4.0m of savings were brought forward from 2022/23 for delivery in 2023/24. 90% of these have now been delivered.

122. Some savings have overdelivered and offset the impact of the undelivered savings.

Childrens' Services

123. The 2023/24 budget included planned savings of £3.9m. 48% of these savings have been delivered and 52% were not delivered. The latter includes £0.5m of savings relating to agency costs reallocated to directorates during the year.

124. It was not possible to deliver £1.9m of savings brought forward from 2022/23.

125. As part of the 2024/25 Budget & Business Planning Process savings from prior years that are not expected to be achievable were restated or removed. The new savings, and risk adjustment agreed as part of the budget in February 2024 then build on that revised baseline position.

Environment & Place

126. The 2023/24 budget includes planned savings of £1.6m. 75% have been delivered. The 25% not been delivered included £0.3m relating to the Home to school contract management and the directorate's £0.2m share of the £1.5m budgeted reduction in agency costs reallocated to directorates during the year.

127. 85% of the £2.3m savings that were not achieved in 2022/23 have been delivered in 2023/24. The on-going impact of an unachieved saving relating to a home to school contract management system was removed as part of the Budget & Business Planning Process for 2024/25.

Public Health & Community Safety

128. The 2023/24 budget included planned savings of £0.2m and 55% have been delivered. The savings not delivered include the directorate's share of the £1.5m budgeted reduction in agency costs which was reallocated to directorates during the year.

Resources

129. The 2023/24 budget includes planned savings of £4.0m and 64% of these were delivered. Savings that it was not possible to deliver include the share of the £1.5m budgeted reduction in agency costs attributable to services in

Resources, catering services commercial savings and digital transformation savings that it was not been possible to achieve.

130. 95% of the £2.0m savings not achieved in 2022/23 have been delivered in 2023/24.

Debt Management

Corporate Debtors

131. The 120-day invoice collection rate was 98.6% in March 2024 and 97.1% for the year; 2.1% above target. The 120-day collection rate based on invoice value for the year was 98.3%.

132. The target level for debt requiring impairment at the end of 2023/24 was £0.3m. The final position was £0.46m and within that the top two cases account for £0.1m of the impaired balance.

133. 177 debtor write-offs were processed in 2024/23 with a combined value of £0.04m, 0.01% of the value of invoices raised in the same period. A further ten corporate write - offs were processed with a value of £0.005m.

Adult Social Care Debtors

134. The 120-day invoice collection rate was 91% in March 2024, 1% below the 92% target. The direct debit collection rate for the year was 62%.

135. The final balance of adult social care contribution debt requiring impairment as at 31 March 2024 was £4.5m. This was £0.1m lower than the 2023/24 carried forward balance which included an increase of £0.9m at the end of 2022/23. The reduction in 2023/24 is the result of the debt focus work that Adult Services ran between June 2022 and March 2024. Plans to further reduce the current level of impaired debt down to the target of £3m over the medium term are being developed and the 2024/25 budget includes a requirement to achieve a £0.150m reduction by the end of 2024/25.

136. There were 196 Adult Social care write offs processed in 2023/24 with a total value of £0.624m. This represented 1.3% of the value of invoices raised (£47.8m).

Budgets Held Centrally

137. The table below shows the final budget and variations against budgets and funding held centrally.

	Final Net Budget £m	Total Spend £m	Year End Variance £m	Year End Variance %	Variance Last Cabinet Reporting Month £m	Change in Variance £m
Budgets Held Centrally						
Capital Financing	19.0	19.4	0.5	2.4%	0.0	0.5
Interest on Balances	-7.2	-15.1	-7.9	109.6%	-2.2	-5.7
Contingency and Inflation	10.9	-0.0	-10.9	-100.1%	-8.7	-2.2
Un-ringfenced Specific Grants	-45.2	-46.5	-1.3	2.9%	0.0	-1.3
Insurance	1.4	1.4	0.0	0.0%	0.0	-0.0
Contribution from COVID-19 reserve	-7.4	-7.4	0.0	0.0%	-1.4	1.4
Contribution from Budget Priority Reserve	-2.4	-2.4	0.0	0.0%	0.0	0.0
Contributions to (+)/from (-)reserves	20.7	21.4	0.7	3.4%	0.0	0.7
Contribution to balances	7.1	7.1	0.0	0.0%	0.0	0.0
Total Budgets Held Centrally	**-3.0**	**-22.0**	**-19.0**	**624.6%**	**-12.3**	**-6.7**

138. At the end of 2023/24, there was a net underspend of £19.0m on budgets and funding held centrally. This includes an underspend of £10.9m against the contingency budget held to support the directorate pressures and £7.9m additional interest on balances received during the year as a result of interest rates being higher than assumed when the budget was set in February 2023.

Capital Financing Costs

139. The minimum revenue provision (MRP) is required to be charged on Prudential Borrowing taken to fund schemes in the capital programme and includes both repayment of the principal and interest costs. The MRP relating to borrowing supporting the capital programme is either recharged to directorates where savings arising from the scheme are expected to meet them or met corporately from the budget for capital financing costs. After taking account of recharges to directorates the actual cost of capital financing was £0.5m above the budget in 2023/24.

Interest on Balances

140. The outturn position for in house interest receivable was £19.6m, £8.6m above the budget. Of this overachievement, approximately £2.0m has been applied to developer contributions in 2023/24 to index those in line with the relevant Section 106 agreements.

141. The additional interest is a result of higher than forecast cash balances

coupled with higher than forecast deposit rates during 2023/24. Currently, every extra £5m within the cash balance will earn approximately £0.25m of interest annually.

142. The interest payable outturn was £12.9m. This is £0.2m below budget, as a result of the early repayment of two £5m LOBOs in August and October 2023.

143. The outturn position for external fund returns was £4.8m, £1.0m above budget.

144. Taken together that means £7.9m additional interest on balances is included the outturn position for the year.

145. Cash balances for the year are £51.9m lower than they would otherwise have been as a result of negative High Needs DSG balances. The impact of this is an estimated opportunity cost of £1.5m in unearned interest during 2023/24.

146. Further information on the year end position for Treasury Management will be included in the Treasury Management Outturn report to Cabinet in July 2024.

Pay Inflation and Contingency

147. The £12.4m contingency budget for 2023/24 included £4.1m funded by one-off council tax and business rates income[4].   This was added to £8.3m on-going contingency agreed as part of the 2023/24 budget.

148. The report to the end of January set out that £2.0m contingency may be needed to fund pay inflation on vacant posts in 2023/24. This was not required to be used in 2023/24 so the underspend has increased to £10.9m at year end.

149. It is anticipated that any of the additional on-going contingency for pay inflation on vacant posts not required to be moved to directorates to support pay costs in 2024/25 can be used to help meet staffing savings built into 2024/25 budgets.

Reserves

150. On 1 April 20223, one – off funding held in earmarked reserves totalled £202.7m. As set out in Annex B-3a this increased to £210.1m as at 31 March 2024. The increase includes budgeted net contributions to/from reserves totalling £12.8m agreed in February 2023, plus other net changes during the year which reduced reserves by £5.4m.

151. The DSG reserve held a deficit balance of £33.6m on 1 April 2023. The net deficit added to the reserve in 2023/24 was £11.4m. There is also a movement on the unusable reserve for the new schools fund of £0.6m. After taking this into account the closing deficit balance was £45.6m as at 31 March 2024. This incorporates a cumulative deficit of £55.8m on High Needs DSG.

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[4] agreed to be added as part of the Provisional Outturn Report 2022/23 to Cabinet in June 2023.

152. Reserves held by the council, including planned contributions agreed as part of the 2023/24 budget and other changes during the year are summarised in the table below. Most of the funding is being held for specific agreed purposes and will be used to support revenue expenditure, including the council's Delivering the Future Together programme, or to fund capital expenditure.

Reserves	Balance at 31 March 2023 £m	Budgeted Contributions to/from Reserves £m	Other Changes to Reserves £m	Balance at 31 March 2024 £m
Revenue Grants Unapplied				
Grants and Contributions Reserve	37.0		-3.2	33.8
COVID-19 Reserve	15.4	-7.4	-0.1	7.9
Government Initiatives Reserve	2.3		0.8	3.2
Subtotal	**54.8**	**-7.4**	**-2.7**	**44.7**
Corporate Priorities				
Budget Priorities Reserve	11.4	1.8	-2.5	10.7
Transformation Reserve	1.5	4.3	-3.9	1.8
Zero Emissions Zone	0.5		0.7	1.2
Youth Provision Reserve	0.3		-0.2	0.0
Subtotal	**13.7**	**6.1**	**-6.0**	**13.8**
Funding for Risk				
Insurance Reserve	12.9		-2.6	10.3
Demographic Risk Reserve	13.0	4.0	0.0	17.0
Council Elections	0.4		0.2	0.6
Redundancy Reserve	2.4		0.0	2.4
Trading Accounts	0.2		-0.1	0.1
Council Tax Collection Fund Reserve	3.0		0.0	3.0
Business Rates Reserve	9.5		2.2	11.7
Subtotal	**41.3**	**4.0**	**-0.4**	**45.0**
Capital & Equipment				
Capital & Prudential Borrowing Reserves	67.8	10.0	3.0	80.8
Vehicle and Equipment Reserve	3.4		0.7	4.1
Investment Pump Priming Reserve	2.0		-1.9	0.1
Subtotal	**73.2**	**10.0**	**1.8**	**85.1**
Other Reserves				
Partnership Reserves	1.9		0.2	2.1
On-Street Car Parking Reserve	4.9		1.6	6.5
Budget Equalisation Reserve	0.0		0.0	0.0
Subtotal	**6.8**	**0.0**	**1.7**	**8.6**

Reserves	Balance at 31 March 2023 £m	Budgeted Contributions to/from Reserves £m	Other Changes to Reserves £m	Balance at 31 March 2024 £m
Unusable Reserves				
Schools' Reserves[5]	12.9		0.1	13.0
Total	**202.7**	**12.8**	**-5.4**	**210.1**
DSG Reserve [6]	-33.6		-12.0	-45.6
Total Reserves	**169.1**	**12.8**	**-17.4**	**164.5**

Grants and Contributions Reserve

153. This reserve holds underspends on ringfenced grant funding which needs to be used in accordance with the relevant grant conditions in future years.

154. The net contribution from this reserve in 2023/24 was £3.2m reducing the total held to £33.8m. The balance includes £11.7m grant funding for the Homes for Ukraine scheme that has not been required to be spent by the end of 2023/24. This will be used to support the on-going costs of the scheme in Oxfordshire in future years.

155. £6.0m relates to the remaining balance of the BT Openreach Broadband Gainshare that was received in 2021/22. This will be used to fund future ICT related capital expenditure in accordance with the Gainshare agreement.

156. Public Health grant funding held in the reserve totalled £4.5m at 31 March 2024.

157. £3.8m Section 106 revenue funding for Public Transport will be used in accordance with the agreements.

158. £3.2m held in the reserve for Childrens' services includes funding for Delivering Better Value on SEND of £0.8m and Supported accommodation reform of £0.3m.

159. £2.3m is held in the reserve to fund Countryside services and developer contributions.

160. Funding of £0.5m for Adult Services includes £0.3m held in relation to the Apprenticeship Fund, to be used in 2024/25 to increase social work capacity, and £0.1m from the Accelerated Reform Fund to be used in 2024/25 to address barriers by adopting innovative practices and build capacity and capability in the adult social care market.

161. Funding relating to the Fire Uplift Grant totalled £0.4m at 31 March 2024. This

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[5] This is made up of surpluses of £14.1m and deficits of £1.1m.
[6] The cumulative High Needs DSG deficit held within the DSG reserve total increased from £41.1m as at 1 April 2023 to £55.8m at 31 March 2024.

is being held to fund employee costs expected to be incurred over the next three to five years.

COVID-19 Reserve

162. Funding held in the COVID-19 reserve as at 1 April 2023 was £15.4m. A planned contribution of £7.4m from the reserve was made as agreed in the 2023/24 budget.

163. In addition to the planned use, £0.1m has been used to extend capacity needed within the Information Management team. £0.5m is committed to further extend capacity needed within the Customer Service Centre to support the council's ability to respond to Complaints/Freedom of Information requests and deliver a wide-ranging set of improvement actions in 2024/25.

164. The balance held in the reserve as at 31 of March 2024 was £7.9m. As set out in the 2024/25 budget and Medium-Term Financial Strategy £6.1m of that total is planned to be used to fund COVID-19 related pressures in future years. £1.4m funding not required to be used to fund pressures in Children's Social Care in 2023/24 based on the position at year end is available to support future pressures or initiatives.

Government Initiatives Reserve

165. This reserve is used to hold underspends on directorate budgets funded by un-ringfenced grants so that the funding remains available for use to support the specified purpose of the grant in future years.

166. The balance held in this reserve at the end of 2023/24 was £3.2m. £0.8m added to the reserve relates to accumulated unused balances from grant funded projects.

167. Adult Services - £0.3m added to the Government Initiative Reserve in 2022/23 related to charging reform, reflecting elements of the Trailblazer programme where costs will continue to be incurred in 2024/25 ahead of the revised date for charging reform in autumn 2025. £0.2m was spent during 2023/24 leaving £0.1m committed against 2024/25 spend.

168. £1.1m is being held to support the provision of accommodation-based support to victims of domestic abuse and their children and the graduate trainee programme in future years

Budget Priorities Reserve

169. This reserve is to fund the priorities of the Council. As at 31 March 2024 £10.7m was held in the reserve.

Funding for Investments in 2023/24

170. A planned contribution from the reserve totalling £1.8m to support one - off Investments set out in this report was agreed as part of the 2023/24 budget and Medium-Term Financial Strategy.

171. £0.1m of £0.5m one - off funding had been spent on Community Hubs as at 31 March 2024. The remaining £0.4m has been held in the Budget Priority reserve for use in 2024/25 (see paragraph 112).

172. £0.7m of the remaining funding for the Councillor Priority Fund is expected to be spent in 2024/25.

173. £1.8m was transferred to the Capital Reserve during 2023/24 to support the capital element of the £2.6m funding for tree replacement. £0.8m to meet the revenue costs of the Tree Aftercare & Planting Service continues to be held in the reserve. The remaining £0.4m of the £3.0m investment agreed as part of the 2023/24 budget was agreed to be released in 2024/25 to support other budget priorities as part of the budget agreed in February 2024.

174. £1.2m was transferred to the Capital Reserve to allow the council to unlock the full £5.2m grant offered by the government to fund four children's homes.

175. £1.0m will be used to support the following priorities which were agreed in 2023/24:
- Vision Zero £0.3m
- Food Strategy £0.3m
- Low Traffic Neighborhoods £0.4m

Funding built into the Budget for 2024/25

176. £3.8m not required for the 20 Mile Per Hour Speed Limit Programme was returned to the Budget Priority Reserve from the Capital Reserve during 2023/24. This will be moved to the Redundancy Reserve in 2024/25 as agreed by council in February 2024.

177. As part of the 2024/25 budget £1.3m was agreed to be used to fund a one – off investment in Improvements to highways, cycle-paths and pavements in 2024/25 and a further £0.1m to support other investments.

Adult Social Care

178. £2.1m held in the reserve at 1 April 2023 was the remaining balance of contributions made by Oxfordshire Clinical Commissioning Group in previous financial years. £1.5m has been used in 2023/24 in agreement with the ICB. A spending plan or the use of the remaining £0.6m funding in 2024/25 and 2025/26 will be agreed with the ICB.

179. £0.5m added to the reserve at the end of 2023/24 relates to funding for committed pressures within the Live Well pooled budget including repairs and refurbishment costs of supported living units and respite properties plus associated development costs. A further £0.4m will be used to fund the completion of backdated (DoLS) cases within Adult Services in 2024/25.

Other

180. £0.1m will be used to fund children's center rents, £0.3m to support additional external audit fees for 2021/22 and 2022/23 and £0.2m for repair and maintenance of Joint Use Agreement Leisure facilities.

Council Elections Reserve

181. This reserve holds funds to meet the cost of the County Council elections every four years. Funding held in this reserve increased by £0.2m to fund future years election activities and totals £0.6m at 31 March 2024. £0.8m will be available to support the cost of the next County Council elections in May 2025.

Transformation Reserve

182. The Transformation Reserve has been used to support the costs of the implementation of the council's transformation programme, Delivering the Future Together.

183. £4.3m funding was transferred from the Budget Equalisation Reserve in 2023/24. £3.9m has been utilised on transformation priorities and the remaining balance of £1.8m will be used to support further priorities in 2024/25.

Zero Emissions Zone (ZEZ)

184. Surpluses generated by Network Coordination are being ringfenced for the development and expansion of the ZEZ in the future years, as well as funding the ongoing cost and maintenance of the existing scheme in Oxford. £0.7m was added to the reserve at the end of 2023/24.

Demographic Risk Reserve

185. In light of the significant pressures relating to High Needs and other budgets with demographic volatility a demographic risk reserve was created in 2019/20. The existing MTFS includes an on-going annual contribution to the reserve of £4.0m £17.0m was held in the reserve at the end of 2023/24.

Capital & Prudential Borrowing Reserves

186. The Capital Reserve holds capital receipts and other funds to meet the cost of borrowing to finance the capital programme. Funding held in the reserve is expected to be used to meet the costs of the capital programme and pipeline agreed in February 2024.

Vehicle & Equipment Reserve

187. £4.1m was held in reserves at the year-end for the renewal of fire and rescue vehicles and breathing apparatus equipment. This reflects an in-year increase of £0.7m with a larger scale of renewal expected from 2024 onwards.

188. £0.5m is being held to cover the cost of the replacement of Airwave for Oxfordshire Fire and Rescue Service and the implementation of the new Emergency Service Mobile Communications Programme.

Investment Pump Priming Reserve

189. This reserve is held to meet the costs of self-financing schemes which require pump priming until the funds are returned. Funding was drawn down fore the

following schemes:

- Low Carbon Business Travel Project (grey fleet) £0.8m
- Energy Efficiency Recycling Fund for OCC Maintained Schools £0.8m
- Initial funding to develop plans for the workplace charging levy £0.2m
- Investigation and development of solar panel programme £0.1m.

On-Street Car Parking Reserve

190. Expenditure and income relating to parking is required to be transacted through the parking account. In accordance with Section 55(4) of the Road Traffic Regulation Act 1984, the Cabinet is required to approve that any surplus from the parking account can be carried forward to support infrastructure and maintenance in future years. After taking into account net income of £4.1m and a £2.6m contribution to support the revenue budget (see Annex B-3c for further detail) a net contribution of £1.6m has been made to the reserve. This contribution is primarily to be held for the benefit of the Highways Infrastructure and Parking Account to fund future drawdowns.

Schools' Reserves

191. As shown in Annex B-3b maintained schools' balances were £12.9m at 1 April 2023 and increased to £13.1m at 31 March 2024. This is made up of surpluses of £15.9m (for 111 schools) and deficits of £2.8m (for 22 schools).

Budget Equalisation Reserve

192. This reserve was previously used to smooth the timing differences between funding changes and emerging pressures over the period of the MTFS. As part of the Business Management & Monitoring report to Cabinet in January 2024, £4.3m was agreed to be transferred into the Transformation Reserve to meet costs associated with continuous improvement and transformation programmes.

Business Rates & Council Tax Collection Fund Reserve

193. These reserves have been held to manage fluctuations in Business Rate and Council Tax income that the Council receives. £1.3m additional business rates grant funding was received during 2023/23 and transferred to the Business Rates reserve. This included:

- £0.6m relating to a Section 31 business rate relief outturn adjustment relating to the financial years prior to and including 2022/23.
- £0.6m additional funding relating to the distribution of the surplus Business Rates levy for 2023/24.
- £0.1 additional grant to offset business rates reliefs for the green plant and machinery exemption.

194. In addition, the council has received £0.8m pooling gain from the North Oxfordshire Business Rates Pool increasing the total held in the reserve at 31 March 2024 to £11.7m. £8.5m will be transferred to the Transformation Reserve in 2024/25 as part of the budget agreed in February 2024.

195. A further £3.0m is held in the Council Tax Collection Fund reserve. As agreed as part of the 2024/25 budget the two reserves will be merged into one Collection Fund Risk Reserve in 2024/25 with an opening balance of £4.0m plus the additional £2.1m income received in 2023/24.   The use of this additional funding will be considered through the Business and Budget Planning Process for 2025/26.

DSG Reserve

196. Schedule 2 to the School and Early Years Finance (England) Regulations 2023, requires a deficit on the Dedicated School's Grant to be carried forward to be funded from future DSG income unless permission is sought and received from the Secretary of State for Education to fund the deficit from general council resources.

197. The total deficit transferred to the DSG reserve at the end of 2023/24 was £11.4m and increased the closing deficit balance to £45.6m as at 31 March 2024. This incorporates an overspend of £14.7m on High Needs, offset by a £3.2m underspend on Early Years, and other minor adjustments.

198. Within the overall total, which also includes positive balances held for Early Years and other purposes, the total unusable High Needs deficit has increased from £41.1m at 1 April 2023 to £55.8m at 31 March 2024.

199. The Local Authorities (Capital Finance and Accounting) (England) (Amendment) Regulations 2020 (SI 2020 No 1212), made by what is now the Department for Levelling Up, Housing and Communities (DLUHC), require DSG deficits to be held in a separate reserve in local authorities' accounts. These regulations, which require the negative balance to be held in an unusable reserve, will come to an end on 31 March 2026. The impact of the unusable reserve on the council's ability to set a balanced budget over the medium term will need to be considered through the Budget & Business Planning Process for 2025/26.

Overall Financial Position

200. The table below summarises the final position compared to the Net Operating Budget for 2023/24 agreed by Council in February 2023. The Net Operating Budget is funded by council tax and business rates income.

	Final Net Budget	Total Spend	Year End Variance	Year End Variance	Variance Last Cabinet Reporting Month	Change in Variance
	£m	£m	£m	%	£m	£m
Directorate Budgets	581.8	588.5	6.6	1.1%	12.3	-5.7
Budgets Held Centrally	-3.0	-22.0	-19.0	624.6%	-12.3	-6.7
Net Operating Budget	**578.8**	**566.5**	**-12.4**	**-2.1%**	**0.0**	**-12.4**
Revenue Support Grant	-0.0	-0.0	0.0	0.0%	0.0	0.0
Business Rates & Council Tax funding	-578.8	-578.7	0.0	0.0%	0.0	0.0
Year-End Position	**-0.0**	**-12.3**	**-12.3**		**0.0**	**-12.4**

201. At the end of 2023/24 there was a combined underspend of £12.3m. This compares to an overall breakeven position reported to Cabinet in March 2024.

202. As agreed as part of the 2024/25 budget, £1.5m of the underspend arising from the additional interest on balances will be used to fund a one – off revenue contribution to the Transformation Reserve in 2024/25. A further £2.2m will be used to make an initial contribution to a new reserve to manage the potential impact of the end of the statutory over-ride for IFRS9, which removes changes in the value of Treasury Management Pooled Funds from the revenue account, from 1 April 2025. This means that £3.7m of the £12.3m underspend that will be held in balances as at 31 March 2024 is already committed in 2024/25.

203. The report to Cabinet in March 2024, noted that a decision on the use of any remaining funding to top up balances to the risk assessed level for 2024/25 and for other purposes would be made through the Provisional Outturn Report to Cabinet in June 2024 and/or the Business Management & Monitoring Reports to Cabinet in 2024/25.

204. Since the underspend is higher than anticipated as a result of the reduction in the directorate overspend it is recommended to:

• Add a further £2.8m to the IFRS9 reserve in 2024/25, increasing the total to £5.0m. That would then be expected to provide sufficient cover for likely risks around changes in the value of pooled funds if those needed to be incorporated into the revenue budget when the statutory over-ride ends in April 2025.

• Create a new pump priming reserve in 2024/25 to support the council's Commercial Strategy with an initial contribution of £2.0m.

- Make a contribution of £1.0m to the Budget Priorities Reserve to be used to complete or extend schemes already agreed as part of the Cabinet's priorities including Rail Studies and an extension of the funding for efficiency loans to schools.

General Balances

205. The risk assessed level of balances for 2023/24 was £30.2m.

206. During the year £0.2m was agreed to be used to fund a supplementary estimate for staffing costs to support development of One - Fleet approach to the council's vehicles, £0.2m has been used to fund a supplementary estimate to fund a deficit budget for a school with a forced academisation, and £0.2m has been used to fund a supplementary estimate to meet one-off ill health/injury costs incurred in Community Services in 2023/24.

207. After taking account of the use of contingency and additional interest on balances, planned changes above as well as supplementary estimates agreed earlier in the year, balances would be balances would be £42.0m, £11.8m above the 2024/25 risk assessed level of £30.2m at year end. On the basis that £3.7m of this will be used to fund contributions to reserves in 2024/25, as well as a further £5.8m as set out in paragraph 204, the remaining £2.3m will be held in balances pending a decision about future use.

Business Management & Monitoring Report
Position to the end of March 2024
Budget Monitoring

Directorate	Final Net Budget	Total Spend	Year End Variance underspend- overspend+	Year End Variance	Variance Last Cabinet Reporting Month	Change in Variance	Year End Traffic Light Red > 1.5% Amber >1.1% <1.5% Green on track
	£000	£000	£000	%	£000	£000	
Adult Services	229,727	229,727	0	0.00%	0	0	G
Children's Services	172,316	180,031	7,715	4.48%	12,954	-5,239	R
Environment and Place	75,342	72,159	-3,183	-4.22%	-2,947	-236	G
Public Health	4,076	3,925	-151	-3.72%	0.0	-151	G
Community Safety	27,024	27,699	675	2.50%	400.0	275	R
Resources	73,343	74,888	1,545	2.11%	1,930	-385	R
Directorate Total Net	**581,828**	**588,429**	**6,601**	**1.13%**	**12,337**	**-5,736**	A

Business Management & Monitoring Report
Position to the end of March 2024
Budget Monitoring

Directorate	Final Net Budget	Total Spend	Year End Variance	Year End Variance	Variance Last Cabinet Reporting Month	Change in Variance	Year End Traffic Light
			underspend- overspend+				Red > 1.5% Amber >1.1% <1.5%
	£000	£000	£000	%	£000	£000	Green on track
Budget held Centrally						0	
Capital Financing	18,985	19,439	454	2.39%	0	454	
Interest on Balances	-7,212	-15,116	-7,904	109.60%	-2,240	-5,664	
Contingency and Inflation	10,878	-11	-10,889	-100.10%	-8,660	-2,228	
Unringfenced Specific Government Grants	-45,169	-46,494	-1,325	2.93%	0	-1,325	
Insurance	1,436	1,436	0	0.00%	0	0	
Contribution from COVID-19 Reserve	-7,380	-7,380	0	0.00%	-1,400	1,400	
Contribution from Budget Priorities Reserve	-2,370	-2,370	0	0.00%	0		
Contributions to (+)/from (-)reserves	20,736	21,449	712	3.44%	0	712	
Contribution to (+)/from(-) balances	7,061	7,061	0	0.00%	0	0	
Total Budget held Centrally	**-3,034**	**-21,986**	**-18,952**	**624.63%**	**-12,300**	**-6,652**	
Net Operating Budget	**578,794**	**566,443**	**-12,351**	**-2.13%**	**37**	**-12,388**	
Revenue Support Grant	-30	-30	0	0.00%	0	0	
Business Rates & Council Tax Funding	-578,764	-578,735	29	-0.01%	0	29	
Forecast Year End Position	**0**	**-12,322**	**-12,322**	**0**	**37**	**-12,359**	

Business Management and Monitoring Report: Adult Services
Position to the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance	Variance Last Cabinet	Change in Variance
				underspend- overspend+		
		£000	£000	£000	£000	£000
SCS1	Adult Social Care	26,316	27,040	724	600	124
SCS2	Other Adult Social Care Services	5,425	4,811	-614	-600	-14
SCS3	Housing & Social Care Commissioning	1,378	1,382	4	0	4
SCS4	Business Support Service	1,141	999	-142	-100	-42
SCS5	Pooled Budget Contributions	195,467	195,496	29	100	-71
	Total Adult Services	**229,727**	**229,727**	**0**	**0**	**0**

Business Management & Monitoring Report: Children's Services
Forecast Position at the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance	Variance Last Cabinet	Change in Variance
				underspend- overspend+		
		£000	£000	£000	£000	£000
CEF1	**Education & Learning**					
CEF1-1	Management & Central Costs	470	814	344	840	-496
CEF1-2	SEND	7,499	7,516	17	0	17
CEF1-3	Learning & School Improvement	1,345	1,291	-54	0	-54
CEF1-4	Access to Learning	30,530	33,506	2,976	3,300	-324
CEF1-5	Learner Engagement Service	282	207	-75	100	-175
	Total Education & Learning	**40,126**	**43,334**	**3,208**	**4,240**	**-1,032**
CEF2	**Early Help, Front Door + Social Care**					
CEF2-1	Family Help	10,135	8,927	-1,208	-1,086	-122
CEF2-2	Front Door	5,295	4,944	-351	-213	-138
CEF2-3	Childrens Social Care - NEW	60,167	62,197	2,030	4,294	-2,264
CEF2-9	Change - NEW	402	54	-348	-147	-201
	Total Early Help, Front Door + Social Care	**75,999**	**76,122**	**123**	**2,848**	**-2,725**

Business Management & Monitoring Report: Children's Services
Forecast Position at the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance underspend- overspend+	Variance Last Cabinet	Change in Variance
		£000	£000	£000	£000	£000
CEF3	**Provider Services & Safeguarding**					
CEF3-1	Provider Services	40,855	44,756	3,901	4,927	-1,026
CEF3-2	QA Safeguarding + Recruit & Retention	3,900	3,971	71	318	-247
CEF3-3	Services for Disabled Children - OLD	0	0	0	0	0
CEF3-4	Youth Offending Service - OLD	0	0	0	0	0
	Total Provider Services & Safeguarding	**44,755**	**48,727**	**3,972**	**5,245**	**-1,273**
CEF4	**Schools**					
CEF4-1	Delegated Budgets	0	-4	-4	0	-4
CEF4-2	Nursery Education Funding (EY)	0	0	0	0	0
CEF4-3	Non-Delegated School Costs	216	188	-28	0	-28
CEF4-4	School Support Non-Negotiable Recharges	0	0	0	0	0
CEF4-5	Capitalised Repairs & Maintenance	0	0	0	0	0
	Total Schools	**216**	**188**	**-28**	**0**	**-28**

Business Management & Monitoring Report: Children's Services
Forecast Position at the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance	Variance Last Cabinet	Change in Variance
				underspend- overspend+		
		£000	£000	£000	£000	£000
CEF5	**Children's Services Central Costs**					
CEF5-1	Management & Administration	8,009	8,398	389	548	-159
CEF5-2	Premature Retirement Compensation	3,211	3,262	51	73	-22
CEF5-3	Commissioning Recharge - OLD	0	0	0	0	0
	Total Children's Services Central Costs	**11,220**	**11,660**	**440**	**621**	**-181**
	Total Children's Services	**172,316**	**180,031**	**7,715**	**12,954**	**-5,239**
	MEMORANDUM: DEDICATED SCHOOLS GRANT - DSG Funded Expenditure (Gross)					
	Schools DSG	129,480	129,193	-287	0	-287
	High Needs DSG	84,694	99,353	14,659	21,200	-6,541
	Early Years DSG	45,175	41,936	-3,239	0	-3,239
	Central DSG	4,992	5,243	251	0	251
	Total DSG Funded Expenditure	**264,341**	**275,725**	**11,384**	**21,200**	**-9,816**

Business Management & Monitoring Report: Environment and Place
Position to the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance	Variance Last Cabinet	Change in Variance
				underspend-overspend+		
		£000	£000	£000	£000	£000
EP1	Transport & Infrastructure	13,587	12,418	-1,169	-1,300	131
EP2	Planning, Environment & Climate Change	37,600	37,140	-460	-600	140
EP3	Highways & Operations	21,530	19,738	-1,792	-1,100	-692
EP4	Directorate Support	2,625	2,863	238	53	185
	TOTAL ENVIRONMENT AND PLACE	**75,342**	**72,159**	**-3,183**	**-2,947**	**-236**

Business Management & Monitoring Report : Public Health & Community Safety
Position to the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance underspend- overspend+	Variance Last Cabinet	Change in Variance
		£000	£000	£000	£000	£000
PH 1 & 2	**Public Health Functions**					
PH1-1	Sexual Health	6,440	6,328	-112	-200	88
PH1-2	NHS Health Check Programme	645	776	131	100	31
PH1-3	Health Protection	8	0	-8	0	-8
PH1-4	National Child Measurement Programme	150	150	0	0	0
PH1-5	Public Health Advice	150	150	0	0	0
PH1-6	0 - 5 year olds	8,848	8,849	1	0	1
PH2-1	Obesity	1,324	1,109	-215	-100	-115
PH2-2	Physical Activity	420	412	-8	0	-8
PH2-3	Public Health General	2,536	2,371	-165	-100	-65
PH2-4	Smoking and Tobacco Control	615	622	7	0	7
PH2-5	Children's 5-19 Public Health Programmes	2,297	2,283	-14	0	-14
PH2-6	Other Public Health Services	1,734	1,539	-195	-100	-95
PH2-7	Drugs and Alcohol	10,517	10,587	70	200	-130
PH2-8	Domestic Violence	1,448	1,448	0	0	0
	Total Public Health Functions	**37,132**	**36,624**	**-508**	**-200**	**-308**
PH3	**Public Health Recharges**	**576**	**573**	**-3**	**0**	**-3**
PH4	**Grant Income**	**-33,632**	**-33,632**	**0**	**0**	**0**
	Transfer to Public Health Reserve	**0**	**360**	**360**	**200**	**160**
	Total Public Health	**4,076**	**3,925**	**-151**	**0**	**0**
CDA3	**Community Safety**	**27,024**	**27,699**	**675**	**400**	**275**
	Total Community Safety	**27,024**	**27,699**	**675**	**400**	**275**

Business Management & Monitoring Report: Resources
Position to the end of March 2024
Revenue Budget Monitoring

		Final Net Budget	Total Spend	Year End Variance	Variance Last Cabinet	Change in Variance
				underspend- overspend+		
		£000	£000	£000	£000	£000
COD1	Corporate Services	2,344	2,277	-67	0	-67
COD2	Human Resources & Organisational Development	4,797	4,252	-545	-500	-45
COD3	Communications, Strategy & Insight	3,470	3,323	-147	-100	-47
COD4	ICT & Digital	10,520	11,084	564	600	-36
COD5	Culture & Customer Experience	12,734	13,157	423	500	-77
COD6	Finance	8,820	9,333	513	500	13
COD7	Property, Investment & FM	19,689	20,157	468	430	38
COD8	Law & Governance	8,016	8,364	348	500	-152
COD9	Delivery & Partnership	2,953	2,941	-12	0	-12
	Total Resources	**73,343**	**74,888**	**1,545**	**1,930**	**-385**

Business Management Report
Position to the end of March 2024

NEW VIREMENTS THAT HAVE BEEN ACTIONED FOR CABINET TO NOTE

Directorate (CD = Cross Directorate)	Month of Cabinet Meeting	Month of Directorate MMR	Narration	Budget Book Line	Service Area	Permanent / Temporary	Expenditure + increase / - decrease £000	Income - increase / + decrease £000
CD	Jun	Feb	Hard FM Planned Maintenance for ASPEN - 2023/24	CEF3-1	Provider Services	T	-12	0
				COD7	Property, Investment & FM	T	12	0
		Mar	Trading Standards costs for compliance activities under Offensive Weapons Act 2019	COM4-5	Trading Standards	T	30	0
				VSMMGT	Strategic Measures	T	0	-30
			Training costs Learning Tree	CEF2-9	Change	T	-5	0
				COD6	Finance & Procurement	T	5	0
			Supporting families PBR Q4 2023/24	CEF2-1	Early Help	T	173	0
				VSMMGT	Strategic Measures	T	0	-173
			Falls - PH contribution	BCFPOOL	Age Well Pool	T	200	-200
				SCS5	Pooled Budget Contributions	T	200	-200
			Accelerated Reform Grant	SCS1-8	Grants & Funding	T	470	0
				VSMMGT	Strategic Measures	T	0	-470
			Strategic Measures - budget tidy	CEF4-2	Early Years Funding Formula	T	123	0
				COM4-2	Fire & Rescue	T	159	0
				VSMMGT	Strategic Measures	T	-445	163
			Green Book pay award 2023/24 adjustments	COD6	Finance & Procurement	P	-104	0
				VSMMGT	Strategic Measures	P	104	0
			Budget tidy to correct grant budgets	CEF1-4	Access to Learning	T	152	0
				CEF4-2	Early Years Funding Formula	T	-123	0
				VSMMGT	Strategic Measures	T	0	-29
			Fire back dated pay award 2022/23 adjustment	COM4-2	Fire & Rescue	T	-887	0
				VSMMGT	Strategic Measures	T	887	0
CS	Jun	Mar	Budget - Support implementation - working together	CEF3-2	QA Safeguard + Recruit + Retention	T	47	-47
			DSG Schools block final 2023-24	CEF4-1	Delegated Budgets	T	-1,856	1,856
				CEF4-3	Non-Delegated Schools Costs	T	167	-167
AS	Jun	Feb	Price uplift budget reallocation	ACSNPOOL	Live Well Pool	P	196	-196
				BCFPOOL	Age Well Pool	P	585	-585
		Mar	ASC & PH contribution to move together	BCFPOOL	Age Well Pool	T	120	-120
				SCS5	Pooled Budget Contributions	T	60	-60
				SCS5	Pooled Budget Contributions	T	-500	500
			Health Reserve 2023/24	ACSNPOOL	Live Well Pool	T	96	-96
			Urgent Emergency Care - ICB	BCFPOOL	Age Well Pool	T	1,090	-1,090
PH&CS	Jun	Feb	Fire Pensions Admin grant 2024/25	COM4-2	Fire & Rescue	P	75	-75
			Fire Additional Pensions grant 2024/25	COM4-2	Fire & Rescue	P	1,061	-1,061
RES	Jun	Mar	Correct Transformation cost centres and reallocate budget to A23000 SLT budget	COD1	Corporate Services	P	10	0
				COD9	Delivery & Partnership	P	-10	0
SM	Jun	Feb	Un-ringfenced grant adjustments	VSMMGT	Strategic Measures	T	166	-166
		Mar	Un-ringfenced grant adjustments	VSMMGT	Strategic Measures	T	49	-49
Grand Total							2,784	-2,784

Business Management & Monitoring Report
Position to the end of March 2024
Earmarked Reserves

	2023/24			Description
	Balance at 1 April 2023	Forecast Movement	Forecast Balance at 31 March 2024	
	£m	£m	£m	
Revenue Grants Unapplied				
Grants and Contributions Reserve	37.0	-3.4	33.7	This reserve holds unspent ring-fenced grants and contributions committed to be spent in future years. This includes £4.5m Public Health ringfenced grant, £11.7m funding for the on-going cost of the Homes for Ukraine Scheme and £6.0m relating to the BT Openreach Broadband Gainshare.
COVID-19 Reserve	15.4	-7.5	7.9	This reserve was created to meet ungoing and emerging presures and longer term service demands arising from the COVID-19 Pandemic. The use of £6.1m funding from the reserve is built into the council's Medium Term Financial Plan agreed in February 2024. After taking account of the planned use of the reserve in 2024/25, £1.4m is available to meet future pressures.
Government Initiatives Reserve	2.3	0.8	3.2	This reserve is used to hold underspends on budgets funded by unringfenced grants held that relate to specific agreed outcomes or the implementation of Government initiatives.
Subtotal Revenue Grants Unapplied	**54.8**	**-10.0**	**44.7**	
Corporate Priorities				
Budget Priorities Reserve	11.4	-0.7	10.7	This reserve is being used to support the implementation of the Council's proirities and the Medium Term Financial Strategy. £3.8m released from the 20 MPH Speed Limit Programme in 2023/24 will be moved to the Redundancy Reserve in 2024/25 as
Transformation Reserve	1.5	0.4	1.8	This reserve is needed to fund the implementation costs of the Council's Transformation programme.
Zero Emissions Zone	0.5	0.7	1.2	This reserve holds surpluses generated by Network Coordination for the development and expansion of the ZEZ in the future years.
Youth Provision Reserve	0.3	-0.2	0.0	
Subtotal Corporate Priorities	**13.7**	**0.1**	**13.8**	

Business Management & Monitoring Report
Position to the end of March 2024
Earmarked Reserves

	2023/24			Description
	Balance at 1 April 2023	Forecast Movement	Forecast Balance at 31 March 2024	
	£m	£m	£m	
Funding for Risk				
Insurance Reserve	12.9	-2.6	10.3	This reserve covers the County Council for insurance claims that, based on the previous experience of the County Council, are likely to be received, as well as a number of insurance related issues.
Demographic Risk Reserve	13.0	4.0	17.0	In light of the significant pressures relating to High Needs DSG and other budgets with demographic volatility. The expectation is that this reserve will help to manage future demographic risk.
Council Elections	0.4	0.2	0.6	This will be used to fund future County Council elections. In years where no County Elections take place any underspend on the Council Elections budget will be transferred to this reserve.
Redundancy Reserve	2.4	0.0	2.4	This reserve is available to fund redundancy costs arising from Transformational Change.
Trading Accounts	0.2	-0.1	0.1	This reserve holds funds relating to traded activities to help manage volatility year to year or future investments.
Council Tax Collection Fund Reserve	3.0	0.0	3.0	This reserve holds any surplus/ deficit as a result of income from council tax being more or less than originally estimated.
Business Rates Reserve	9.5	2.2	11.7	This reserve has been held to smooth volatility in Business Rates income and to mitigate risk around future changes to Business Rates. £8.5m will be transferred to the Transformation Reserve in 2024/25 as part of the budget agreed in February 2024. £0.7m will be used to support the 2024/25 budget as set out in the Financial Monitoring Report to Cabinet in May 2024.
Subtotal Risk	**41.3**	**3.6**	**45.0**	

Business Management & Monitoring Report
Position to the end of March 2024
Earmarked Reserves

	2023/24			Description
	Balance at 1 April 2023	Forecast Movement	Forecast Balance at 31 March 2024	
	£m	£m	£m	
Capital & Equipment				
Capital Reserves	67.8	13.0	80.8	This reserve has been established for the purpose of financing capital expenditure in future years.
Vehicle and Equipment Reserve	3.4	0.7	4.1	This reserve is to fund future replacements of vehicles and equipment.
Investment Pump Priming Reserve	2.0	-1.9	0.1	Funding held to meet the costs of self-financing schemes which require pump priming until the funds are returned. Agreed to be used to support the following schemes as part of the 2023/24 budget: Low Carbon Business Travel Project (grey fleet) £0.8m, Energy Efficiency Recycling Fund for OCC Maintained Schools £0.8m, Initial funding to develop plans for the workplace charging levy £0.2m.
Subtotal Capital & Equipment	**73.2**	**11.8**	**85.1**	
Other Reserves				
Schools' Reserves*	12.9	0.1	13.0	In accordance with the Education Reform Act 1988, the scheme of Local Management of Schools provides for the carry forward of individual schools surpluses and deficits. These reserves are committed to be spent on schools. Other School Reserves cover a number of miscellaneous education activities, including amounts loaned to individual schools against school reserves, and School Partnership Accounts which are operated in respect of inter-school activities.
Partnership Reserves	1.9	0.2	2.1	This relates to funding for the Growth Deal
On Street Car Parking Reserve	4.9	1.6	6.5	This surplus has arisen under the operation of the Road Traffic Regulation Act 1984 (section 55). The purposes for which these monies can be used are defined by statute.
Subtotal Other Reserves	**19.7**	**1.8**	**21.6**	
Total Earmarked Reserves	**202.7**	**7.4**	**210.1**	

Business Management & Monitoring Report
Position to the end of March 2024
Earmarked Reserves

	2023/24			Description
	Balance at 1 April 2023	Forecast Movement	Forecast Balance at 31 March 2024	
	£m	£m	£m	
DSG Unusable Reserve **	-33.6	-12.0	-45.6	
DSG High Needs deficit within Unusable Reserve **	**-41.1**	**-14.7**	**-55.8**	** total exluding postive balances (eg. new schools set up fund offset by High Needs Deficit)
Total Earmarked Reserves after DSG Unusable Reserve	**169.1**	**-4.6**	**164.5**	

* This is made up of surpluses of £14.1m and deficits of £1.1m.

Business Management & Monitoring Report
Summary of Financial Position for 2023/2024
MAINTAINED SCHOOL BALANCES

1. Number of Schools with Deficit/Surplus Budgets

	Number of Schools 31 March 2023		Number of Schools 31 March 2024	
	Deficit Balance	Surplus Balance	Deficit Balance	Surplus Balance
Primary	16	113	20	109
Secondary	1	0	1	0
Special	0	4	1	3
Total	**17**	**117**	**22**	**112**

2. Balances as at 31 March 2023 and 31 March 2024

	Balances at 31 March 2023			Balances at 31 March 2024		
	Deficit Balance	Surplus Balance	Total Balance	Deficit Balance	Surplus Balance	Total Balance
	£m	£m	£m	£m	£m	£m
Primary	1.269	-13.557	-12.288	1.572	-14.570	-12.999
Secondary	1.142	0.000	1.142	1.108	0.000	1.108
Special	0.000	-1.784	-1.784	0.142	-1.393	-1.251
Total	**2.411**	**-15.341**	**-12.929**	**2.821**	**-15.963**	**-13.142**
Schools Contingency, Closed Schools and Other Balances			0.003			0.000
School Loans and Other School Related Reserves			0.000			0.000
Schools Balance as shown in Annex 3a			**-12.927**			**-13.142**

	Balances 31 March 2024	
	Largest Individual Surplus	Largest Individual Deficit
	£m	£m
Primary	- 0.521	0.399
Secondary	-	1.108
Special	- 0.692	0.14

Business Management & Monitoring Report
Summary of Financial Position for 2023/2024
ON/OFF-STREET CAR PARKING 2022/23 - ACTUAL INCOME / EXPENDITURE AND IMPACT ON PARKING RESERVE

	ON - STREET PARKING											OFF - STREET PARKING			
	OXFORD CITY	OXFORD CITY	OXFORD CITY	VALE of WHITE HORSE	SOUTH OXFORD SHIRE	WEST OXFORDS HIRE	CHERWELL	SUBTOTAL	TRAFFIC CONTRAVENTION & BAY SUSPENSION	BUS LANE CAMERA ENFORCEMENT	TOTAL ON - STREET PARKING	WATER EATON PARK AND RIDE	THORNHILL PARK AND RIDE	BICESTER PARK AND RIDE	TOTAL OFF- STREET PARKING
	Pay & Display	Parking Contraventions	Designated Parking Places					a	f	b	a+b+f	c	d	e	c+d+e
	£	£	£	£	£			£		£	£	£	£	£	£
EXPENDITURE															
PURCHASE EQUIPMENT								0			**0**				**0**
MANAGEMENT CONTRACT	-60,434	139,458	131,517	82,435	136,968	237,896	428,903	1,096,743			**1,096,743**	9,999	-1		**9,998**
STAFF COSTS	94,601	88,808	88,866	11,586	11,586			295,447		225,930	**521,377**	28,965	28,965		**57,931**
								0			**0**				**0**
OTHER	531,478	1,324,007	384,973	1,353	5,946	23,814	29,965	2,301,536	127,435	302,063	**2,731,034**	325,331	492,792	89,489	**907,611**
TOTAL EXPENDITURE	**565,645**	**1,552,273**	**605,356**	**95,374**	**154,500**	**261,710**	**458,868**	**3,693,726**	**127,435**	**527,993**	**4,349,154**	**364,295**	**521,756**	**89,489**	**975,540**
INCOME															
TOTAL	-3,035,885	-1,038,427	-1,708,171	-94,332	-249,314	-213,280	-312,894	-6,652,303	-397,594	-1,732,073	**-8,781,970**	-354,201	-798,308		**-1,152,510**
TOTAL INCOME	**-3,035,885**	**-1,038,427**	**-1,708,171**	**-94,332**	**-249,314**		**-312,894**	**-6,652,303**	**-397,594**	**-1,732,073**	**-8,781,970**	**-354,201**	**-798,308**	**0**	**-1,152,510**
NET SURPLUS (-) or DEFICIT (+)	**-2,470,240**	**513,846**	**-1,102,815**	**1,043**	**-94,814**		**145,974**	**-2,958,577**	**-270,159**	**-1,204,080**	**-4,432,816**	**10,094**	**-276,552**	**89,489**	**-176,970**
		-588,969													

Designated parking places refer to any bay designated to a class of vehicle or specific purpose and include pay & display bays (some enforcement of rather than income from parking charges), resident's bays, business bays, disabled bays, loading bays, doctors bays, ambulance bays, etc. whether they are inside of outside of a controlled parking zone.

Parking contraventions are any other contraventions whether they be inside or outside of controlled parking zones.

Balance on Parking Reserve as at 1 April 2023   4,945,347

On-Street Parking	2,958,577	(a)
Less Net Parking Budget	-2,080,300	not included in the table above
Less P&R Ticket Offer	-469,271	
Surplus from Camera Enforcement	1,204,080	(b)
Traffic contraventions	270,159	
Surplus P&R	276,552	(d)

TOTAL CONTRIBUTION TO PARKING RESERVE   **2,159,797**

Deficit from Water Eaton	-10,094	(c)
Deficit from Bicester	-89,489	(e)

TOTAL CONTRIBUTION FROM PARKING RESERVE   **-99,583**

Contribution to 2023/24 revenue budget   **-500,000**

Balance on Parking Reserve as at 31 March 2024   **6,505,561**

Business Management Report
Position to the end of March 2024
Government Grants 2023/24

Ringfenced	Directorate	Issued By	Esimate 2023/24	In year Adjustments / New Allocations previously reported	In year Adjustments/ New Allocations reported this time	Final Grant Received in 2023/24	Total Spent	Carried forward for use in future years
			£000	£000	£000	£000	£000	£000
	Adult Services							
R	Improved Better Care Fund	DHSC	10,705	0	0	10,705	10,705	0
R	Adult Social Care Market Sustainability and Improvement Fund	DHSC	5,366	0	0	5,366	5,366	0
R	Adult Social Care Discharge Fund	DHSC	1,501	0	0	1,501	1,501	0
R	Adult Social Care Market Sustainability and Improvement Fund - Workforce Fund	DHSC	0	3,485	0	3,485	3,485	0
R	Adult Social Care Apprenticeship Fund	DHSC	0	0	300	300	0	300
R	Better Care Fund Regional Assurance	DHSC	0	0	0	0	0	0
R	CQC Review and Assessment Grant	DHSC	0	27	0	27	27	0
	TOTAL ADULT SERVICES		**17,572**	**3,512**	**300**	**21,384**	**21,084**	**300**
	Children's Services							
	Dedicated School Grants							
R	Dedicated Schools Grant (DSG) - Schools Block	DfE	131,138	31	-1,689	129,480	129,480	0
R	Dedicated Schools Grant (DSG) - Central Block	DfE	4,992	0	0	4,992	5,225	-233
R	Dedicated Schools Grant (DSG) - Early Years Block	DfE	44,341	94	740	45,175	41,936	3,239
R	Dedicated Schools Grant (DSG) - High Needs Block	DfE	85,288	-594	0	84,694	99,353	-14,659
	Subtotal DSG Grants		**265,759**	**-469**	**-949**	**264,341**	**275,994**	**-11,653**
	School Grants							
R	Pupil Premium	DfE	7,663	531	66	8,260	8,260	0
R	Education Funding Agency - Sixth Form Funding and Threshold	DfE	280	39	11	330	330	0
R	PE and Sport Grant	DfE	2,266	-49	-1	2,216	2,216	0
R	Universal Infant Free School Meals	DfE	3,938	109	-1	4,046	4,046	0
R	Teacher's Pay Grant	DfE	95	-95	0	0	0	0
R	Teacher's Pension Grant	DfE	274	-264	2	12	12	0
R	National Professional Qualification Grant	DfE	0	15	0	15	15	0
R	Early Career Framework - Off Timetable	DfE	0	161	0	161	161	0
R	Early Career Framework - Mentor	DfE	0	93	6	99	99	0
R	Coronavirus (COVID-19) Recovery Premium	DfE	0	462	814	1,276	1,276	0
R	Coronavirus (COVID-19) National Tutoring Programme	DfE	0	408	-328	80	80	0
R	Teacher's Pay Additional Grant	DfE	0	1,404	322	1,726	1,726	0
R	Early Year Supplement Grant	DfE	0	2,978	0	2,978	2,978	0
R	Early Years Teachers Pay Additional Grant	DfE	0	0	167	167	167	0
R	Mainstream Schools Additional Grant	DfE	0	4,285	0	4,285	4,285	0
	Subtotal School Grants		**14,516**	**10,077**	**1,058**	**25,651**	**25,651**	**0**

Business Management Report
Position to the end of March 2024
Government Grants 2023/24

Ringfenced	Directorate	Issued By	Esimate 2023/24 £000	In year Adjustments / New Allocations previously reported £000	In year Adjustments/ New Allocations reported this time £000	Final Grant Received in 2023/24 £000	Total Spent £000	Carried forward for use in future years £000
	Other Children's Services Grants							
R	Additional support for schools in financial difficulty	DfE	0	331	0	331	331	0
R	Youth Justice Grant	YJB	674	37	0	711	711	0
R	Asylum (UASC and Post 18)	HO	3,997	2,580	451	7,028	7,028	0
R	Afghan Settler Holding Hotel Fund	DfE	0	0	419	419	419	0
R	Extension of Virtual School Heads to children with a social worker	DfE	0	135	0	135	135	0
R	Extension of Virtual School Heads to Certain Previously Looked after Children	DfE	0	66	0	66	66	0
R	Hong Kong BNO Local Community Fund	DLUHC	0	0	26	26	26	0
R	Pupil Premium Plus post 16 pilot	DfE	0	45	0	45	45	0
R	Extended Personal Adviser Duty Grant - Care Leavers Staffing	DfE	103	9	0	112	112	0
R	Leaving Care Allowance Uplift	DfE	0	136	0	136	136	0
R	Staying Put Implementation Grant	DfE	288	0	0	288	288	0
R	Remand Framework	YJB	72	-36	-3	33	33	0
R	Reducing Parental Conflict Workforce Development Grant	DWP	0	48	12	60	60	0
R	Supported Internships for Young People with SEND	NDTi	54	0	-34	20	0	20
R	Holiday Activities and Food Programme	DfE	296	1,203	-69	1,430	0	1,430
R	Adopton Support Fund	DfE	0	15	66	81	31	50
R	Early Years Professional Development Programme	DfE	0	0	56	56	0	56
R	Early Years Experts and Mentors Programme	DfE	0	0	8	8	0	8
R	Intervention Delivering Better Value in SEND - Grant for Data Analysis	DfE	0	1,000	0	1,000	780	220
R	Family Group Conferences	DfE	0	54	-41	13	13	0
R	Multiply	DfE	899	0	-442	457	457	0
R	Turnaround Programme	YJB	64	63	24	151	151	0
R	Home for Ukraine Education	DfE	0	0	72	72	72	0
R	Child Decision Making Pilots (NRM)	HO	0	0	38	38	38	0
R	Strengthening Multi-Agency Leadership for reform	DfE	0	47	0	47	47	0
R	Fostering Recruitment Support Hub Mobilisation	DfE	0	0	39	39	0	39
R	Implementation of Supported Accommodation Reforms	DfE	0	299	0	299	299	0
	Subtotal Other Children's Services Grants		**6,447**	**6,032**	**621**	**13,100**	**11,277**	**1,823**
	TOTAL CHILDREN'S SERVICES		**286,722**	**15,640**	**730**	**303,092**	**312,922**	**-9,830**

Business Management Report
Position to the end of March 2024
Government Grants 2023/24

Ringfenced	Directorate	Issued By	Esimate 2023/24 £000	In year Adjustments / New Allocations previously reported £000	In year Adjustments/ New Allocations reported this time £000	Final Grant Received in 2023/24 £000	Total Spent £000	Carried forward for use in future years £000
	Environment & Place							
R	Bus Service Operators Grant	DfT	514	0	280	794	407	387
R	Natural England	DEFRA	227	0	70	297	289	8
R	Bus Service Improvement Plan Grant	DfT	0	0	2,586	2,586	1,294	1,292
R	Homes England	DEFRA	0	0	313	313	313	0
R	COVID-19 Bus Services Support Grant	DfT	0	48	49	97	97	0
R	Biodiversity Net gain Grant	DEFRA	0	27	0	27	0	27
R	Woodland Creation Accelerator Fund (WCAF)	DEFRA	0	75	0	75	65	10
R	DEFRA CHLF S31 Grant	DEFRA	0	0	76	76	26	50
R	Air Quality SSCL Grant	DEFRA	0	127	0	127	0	127
R	Capability Fund	DfT	0	260	0	260	164	96
R	Climate Action Staffing Grant	Innovate UK	0	0	3	3	3	0
R	Historic Ridegway	DfT	0	0	19	19	19	0
	TOTAL ENVIRONMENT & PLACE		**741**	**537**	**3,396**	**4,674**	**2,677**	**1,997**
	Public Health							
R	Public Health Grant	DHSC	33,632	0	0	33,632	33,632	0
R	Oxfordshire Community Research Network Grant	Innovate UK	0	0	8	8	8	0
	TOTAL PUBLIC HEALTH		**33,632**	**0**	**8**	**33,640**	**33,640**	**0**
	Community Safety							
R	Fire Fighter's Pension Fund Grant	DLUHC	1,361	0	0	1,361	1,361	0
R	Fire Protection Uplift Grant	DLUHC	0	303	0	303	303	0
R	Fire Fighter's New Dimensons Grant	DLUHC	40	0	0	40	40	0
	TOTAL COMMUNITY SAFETY		**1,401**	**303**	**0**	**1,704**	**1,704**	**0**

Business Management Report
Position to the end of March 2024
Government Grants 2023/24

Ringfenced	Directorate	Issued By	Esimate 2023/24 £000	In year Adjustments / New Allocations previously reported £000	In year Adjustments/ New Allocations reported this time £000	Final Grant Received in 2023/24 £000	Total Spent £000	Carried forward for use in future years £000
	Resources							
R	Homes for Ukraine *	DLUHC	6,503	0	-2,431	4,072	4,072	0
R	Household Support Fund	DWP	0	0	3,351	3,351	3,351	0
R	Music Service	AC	844	0	22	866	866	0
R	MaaS:CAV	Innovate UK	313	0	-120	193	193	0
R	Park & Charge	Innovate UK	206	0	-206	0	0	0
R	Virgin Park & Charge	Innovate UK	7	0	-7	0	0	0
R	Data Driven Safety Tool	Innovate UK	91	0	-91	0	0	0
R	Quantum Gravitometer	Innovate UK	69	0	-69	0	0	0
R	Resilient CAV	Innovate UK	25	0	-25	0	0	0
R	Heart Park Project	DfT	90	0	-90	0	0	0
R	GTC DfT Congestion Tool	DfT	59	0	-59	0	0	0
R	CAVL4R	DfT	11	0	-11	0	0	0
R	Skyway	Innovate UK	0	0	55	55	55	0
R	Zev Team	Innovate UK	0	0	218	218	218	0
R	Schemes Monitoring Costs	DfT	0	0	30	30	30	0
R	Designed for Ageing Medication Management	Innovate UK	0	0	110	110	110	0
R	Soteria	Innovate UK	0	0	19	19	19	0
R	GreenLog	Innovate UK	0	0	31	31	31	0
R	Future Flights & Land Infrastructure	Innovate UK	0	0	103	103	103	0
R	Vehicle to energy communities	Innovate UK	0	0	3	3	3	0
R	Hyer Project	Innovate UK	0	0	37	37	37	0
R	International Recruitment Fund	DHSC	0	0	178	178	178	0
	TOTAL RESOURCES		**8,219**	**0**	**1,047**	**9,266**	**9,266**	**0**

Business Management Report
Position to the end of March 2024
Government Grants 2023/24

Ringfenced	Directorate	Issued By	Esimate 2023/24 £000	In year Adjustments / New Allocations previously reported £000	In year Adjustments/ New Allocations reported this time £000	Final Grant Received in 2023/24 £000	Total Spent £000	Carried forward for use in future years £000
	Strategic Measures							
U	Lead Local Flood Authority	DEFRA	45	-45		0	0	
U	Extended Rights to Free Travel	DfE	278	531		809	809	
U	Firelink	DLUHC	213	-83		130	130	
U	Local Authority Delivery Support Funding	DLUHC	0	123		123	123	
U	Key Stage 2 Moderation & Phonics	DLUHC	0	21		21	21	
U	Supporting Families - previously Troubled Families	DLUHC	1,048	377	173	1,598	1,598	
U	New Homes Bonus	DLUHC	1,700		49	1,749	1,749	
U	Local Reform & Community Voices	DHSC	328			328	328	
U	Social Care in Prisons Grant	DHSC	187		-4	183	183	
U	War Pensions Disregard Grant	DHSC	0		105	105	105	
U	Social Care Support Grant (including Independent Living Fund)	DLUHC	32,669		15	32,684	32,684	
U	Services Grant	DfE	2,800		110	2,910	2,910	
U	Domestic Abuse Duty Grant	DLUHC	1,141	26		1,167	1,167	
U	Supplementary Substance Misuse Treatment & Recovery Grant	OHID	0	635		635	635	
U	Supplementary Substance Misuse Treatment & Recovery Housing Grant	OHID	0	622		622	0	622
U	Supplementary Substance Misuse Inpatient Detox & Rehabilitation	OHID	0	80		80	80	
U	Rough Sleeping Drugs & Alcohol Grant	DLUHC	0	1,370		1,370	1,370	
U	Rough Sleeping Strategy - care leavers	DLUHC	0	95		95	95	
U	Dual Running & Client Level Data	DHSC	0	20		20	20	
U	Accelerated Reform Grant	DHSC	0		470	470	323	147
U	Trading Standards costs for compliance activities under Offensive Weapons Act 2019	HO	0		30	30	0	30
U	New Burdens - Transparency	DLUHC	0		13	13	13	
U	Wraparound Provision Early Years	DfE	0		29	29	16	13
	Subtotal Strategic Measures		**40,409**	**3,771**	**989**	**45,169**	**44,357**	**812**

Business Management Report
Position to the end of March 2024
Government Grants 2023/24

Ringfenced	Directorate	Issued By	Esimate 2023/24	In year Adjustments / New Allocations previously reported	In year Adjustments/ New Allocations reported this time	Final Grant Received in 2023/24	Total Spent	Carried forward for use in future years
			£000	£000	£000	£000	£000	£000
	Business Rates							
U	Section 31 Grant for Business Rate Compensation	DLUHC	14,427	4,671		19,098	19,098	
U	Business Rates S31 Grant Top-Up	DLUHC	42,662	-2,686		39,976	39,976	
	Subotal Business Rates		**57,089**	**1,985**	**0**	**59,074**	**59,074**	**0**
	Grants held on behalf of Local Enterprise Partnership							
R	Oxford Innovation Business Support	BEIS	205			205	205	
R	European Regional Development Fund		900			900	900	
R	DCLG (Local Enterprise Partnership Funding)	DLUHC	500			500	500	
	Subtotal Grants held on behalf of Local Enterprise Partnership		**1,605**	**0**	**0**	**1,605**	**1,605**	**0**
	TOTAL STRATEGIC MEASURES		**99,103**	**5,756**	**989**	**105,848**	**105,036**	**812**
	Total All Grants		**447,390**	**25,748**	**6,470**	**479,608**	**486,329**	**-6,721**

R	Ringfenced grant	**DLUHC**	Department for Levelling Up, Housing and Communities
U	Un-ringfenced grant	**BEIS**	Department for Business, Energy & Industrial Strategy
	Issued by	**OHID**	Office for Health Improvement and Disparities
HO	Home Office	**DEFRA**	Department for Environment, Food and Rural Affairs
DHSC	Department of Health & Social Care	**AC**	Arts Council
DfT	Department for Transport	**YJB**	Youth Justice Board
DfE	Department for Education	**NDTi**	National Development team for Inclusion

Business Management & Monitoring Report
Position to the end of March 2024
General Revenue Balances

| | | Outturn 2023/24 | |
		£m	£m
	General Balances: Outturn 2022/23	22.643	
	County Fund Balance		**22.643**
	Planned Contribution to top up to 2023/24 risk assessed level (February 2023)		6.800
	Further contribution needed to top up to risk assessed level following 2022/23 year end (		0.800
	Adjusted Opening Balance for 2023/24		**30.243**
	Supplementary Estimates Agreed during 2023/24		
Cabinet May 2023	Staffing costs to support development of One - Fleet approach to the council's vehicles		-0.180
Cabinet November 2023	Supplementary estimate for a school with a forced academisation that has a deficit budget		-0.200
Cabinet March 2024	Supplementary estimate to cover the one-off ill health/injury costs incurred during 2023/24 in Community Services		-0.159
	Subtotal Supplementary Estimates		**-0.539**
	Automatic calls on/returns to balances		0.000
	Net General Balances		**29.704**
	Forecast Variation at Year End		
	Less underspend (as set out in Annex 1)		12.322
	Year End position		**42.026**
	Risk Assessed Level of Balances for 2023/24		**30.200**
	Surplus/(deficit) balances compared to risk assessed level		**11.826**
	Calls on balances agreed as part of the Budget for 2024/25		
	£1.5m of the underspend arising from the additional interest on balances will be used to fund a one – off revenue contribution to the Transformation Reserve in 2024/25 (agreed in February 2024)		-1.500
	£2.2m contribution to the IFRS9 reserve in 2024/25 to provide initial funding towards risks around the value of Treasury Management pooled funds when the current statutory over-ride ends.		-2.200
	Subtotal		**-3.700**
	Calls of balances recommended in this report		
	Further £2.8m contribution to the IFRS9 reserve in 2024/25 to provide sufficient cover for likely risks.		-2.800
	Create a new Pump Priming reserve in 2024/25 to support the council's Commercial Strategy with an initial contribution of £2.0m.		-2.000
	Make a contribution of £1.0m to the Budget Priorities Reserve to be used to complete or extend schemes already agreed as part of the Cabinet's priorities including Rail Studies and an extension of the funding for efficiency loans to schools.		-1.000
	Subtotal		**-5.800**
	Balance to be held in General Balances		**2.326**

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Digital Inclusion:

Oxfordshire County Council 2023-24 Action Plan Updates

This document sets out the updates to the action plan for 2023-24 that supports Oxfordshire County Council's Digital Inclusion Strategy.

The Strategy is divided into three sections.

- Section One – Digitally Inclusive Communities

- Section Two – Digitally Inclusive Service Delivery

- Section Three – Digitally Inclusive Workforce

Section One: Digitally Inclusive Communities

Long-Term Ambition	Action	Directorate and Lead Officer	Updates
Digital access is not a barrier to education in Oxfordshire.	Collaborate with holiday activity providers to implement Digital Inclusion projects as part of wider holiday delivery, including using Libraries as venues.	Children, Education, and Families (CEF)	We have completed this action, and it has been integrated into business as usual.
	Liaise with the Education Endowment Fund (EEF) for guidance on impactful research-	CEF	This action has not been completed due to competing priorities. It will be reviewed to see if it

	based approaches so the right equipment, access and programmes can be promoted to families.		is appropriate to carry this over into the 24-25 action plan.
Vulnerable children and families have access to support to raise household digital capacity and address digital disadvantage.	Continue to provide a digital offer for 0-19 services, through single point of access and e-platforms and ensuring access for vulnerable families.	Public Health	Chat Health is used by Oxford Health to provide advice and support to families. This digital offer will continue with the newly commissioned Children and Young People's Public Health Nursing Service from 1st April 2024. Public Health will also be commissioning a Children and Young Person's digital platform for emotional health and wellbeing to launch in 2024.
	Support families with making applications from charities such as 'Aspire' for laptops as part of communicating with families about their internet access and equipment, seeking to ensure families are not disempowered if they do not have these.	CEF	Work is in progress on this action and will continue in 2024-25 with more focussed efforts.
	Continue to promote the use of the Mind Of My Own (MOMO) app with children and young people to enable them to use their voice and speak their own words via a digital platform.	CEF	Work is in progress on this action and will continue into 24-25 with a focus on using data.

	Continue to support Community Action Groups (CAGs) to host repair cafes across the county potentially helping to prevent residents from becoming digitally excluded by aiming to keep electronic devices (including internet enabled devices) in use for longer. This will be measured through the number of repair cafes held each year (reported annually).	Waste	We continue to support CAGs in hosting repair cafes. The data for April 22 – March 23 is: 21 groups (including three non-CAGs, but members of the repair cafe network) ran 172 repair cafe events enabling members of the public to 'fix not bin' broken household items, from electrical appliances and bicycles to clothes. Portable Appliance Testing (PAT): CAG offered 6 subsidised spaces for volunteers from CAG repair cafes to attend a certified PAT training delivered by PlugTest and hosted by Orinoco.
	Investigate funding options for digital inclusion to get laptops or mobile interactive devices in supported housing or for those facing homelessness so people can claim benefits, apply for jobs, and stay in touch with families and friends through online chat, reducing social isolation.	Adult Social Care	Work is going on in all the Alliance services, especially for people who sleeping rough and in high risk, to ensure that people they are working with are given a mobile phone to enable contact. During Covid, the Oxfordshire Homeless Movement funded tablets for people in homeless supported accommodation and funded Aspire to install WIFI in all rooms. There is signposting from the Oxfordshire Homeless Movement to partners offering computer access including the Getting Oxfordshire Online project. Please see link for support: I need help to get online The following provision is available at the Gatehouse:

			- Approximately 2 evenings per week (5:00pm-7:00pm) – open-access, internet-connected computers available to Guests (service users) at our community café. - Weekly for one quarter per year (5:00pm-7:00pm) – facilitated drop-in IT workshops, with tutors available to provide practical help on a wide variety of IT-related topics - Investment in a new, high-quality Guest wi-fi network that can be used in and around the building during waking hours (coming soon!) - Access to data SIM cards for mobile phones, and mobile data USB dongles for PCs - Links to the "Getting Oxfordshire Online" program via Aspire, to obtain refurbished laptops for Guests. - Signposting to further training is available. Connection Support: The Housing Support Prevention Service have a dedicated digital support worker who provides support across the County to people who are digitally excluded.
No one in Oxfordshire will be isolated from essential services by digital-by-	Promote any relevant support of pillars of the strategy through our networks – e.g., Promoting laptop donation to Get Oxfordshire Online (GOO) via the Greentech network.	Climate Action	This action has been completed, and has been integrated into business as usual as part of the Circular Economy workstream
	Develop a new website for domestic abuse services in	Public Health	We have completed a review and development of the OCC public facing website which has provided

default barriers, or a lack of connectivity.	Oxfordshire to provide improved access to services, clear referral pathways including for people with protected characteristics to improve visibility and access to information, advice, and referral pathways into services.		clearer access to commissioned services. Further website developments at a system level are being explored.
	Provide advice and support to enable people to access digital opportunities safely, and avoid frauds, particularly in community engagement and education work with schools and older people.	Trading Standards	This action has been completed and is now part of business as usual.
	Deliver scam awareness training in a non-digital way, to be measured through the number of people reached through prevention activities, including information on online scams.	Trading Standards	This action has been completed and is now part of business as usual. 3478 people have been reached through Trading Standards preventative advice and support.
	Research, identify and promote support around digital literacy for carers, including young carers.	Adult Social Care	We have developed an all-age carers strategy, which includes improved identification of carers, and are improving our online offer. This will be rolled over to 24-25. Digital inclusion for young carers https://www.carersfirst.org.uk/news-and-stories/digital-champions-programme-for-young-adult-carers/

	Encourage supported housing providers to provide support and training for older people or people with a disability to access and use online services.	Adult Social Care	Work is in progress for this action, and will be reviewed for next year's action plan.
	Work with local partner to securely recycle 50 OCC devices a year to be used by residents needing laptops.	Digital and IT	We donated 200 laptops to be used by residents in 2022. This action will roll over to 24-25.
Oxfordshire businesses and organisations can recruit, train, retain and support their workforce with the necessary digital skills.	Develop digital inclusion pages on Oxfordshire County Council's (OCC) website. The webpages are to include advice, guidance and information on digital scams, Live Well Oxfordshire, and link in with online sources of information that can assist residents and businesses in Oxfordshire.	Policy	This action has been completed with our new webpages: • Digital inclusion | Oxfordshire County Council • Digital Inclusion | Digital Infrastructure Programme (digitalinfrastructureoxfordshire.co.uk) Part of this action will continue into 24-25 for the pages on Live Well Oxfordshire.
	Build on the Digital Inclusion Charter to regularly bring together local partners to avoid duplication of effort across Oxfordshire and share best practice.	Policy	This action is a work in progress and will continue into 24-25. Further collaboration with Getting Oxfordshire Online will be built upon.
Broadband connectivity across Oxfordshire is one of the	Promote social tariffs from broadband suppliers via OCC's Social Media channels and track the engagement with posts: share this information with district and	Digital and IT	The Social Tariffs campaign has been planned and arranged with OCC corporate comms and will be launched in 24-25.

Long-Term Ambition	Action	Directorate and Lead Officer	Updates
best in the country.	parish councils so they can promote widely, and with other OCC digital inclusion activities.		

Section Two: Digitally Inclusive Service Delivery

Long-Term Ambition	Action	Directorate and Lead Officer	Updates
Innovative solutions to problems of digital exclusion are collaboratively developed and delivered in our services.	Use Office for Health Improvement Disparities (OHID) grants to provide technology to substance misuse service users, supporting them to progress towards recovery e.g., with job applications, housing applications, education, and training	Public Health	Personalised budgets within the Supplemental Substance Misuse Treatment and Recovery Grant and Housing Support Grants are being utilised to purchase tablets and IT software to support people to engage in treatment, support training and employment goals, and maintain tenancies. There is a new grant for employment support starting in April 2024, and it is also planned to have a personalised budget element for this purpose.

The Better Housing Better Health service offers home visits to people who may have no or limited access to digital resources and provides support to households in accessing home improvement grants and other resources which are only accessible online |

	Explore asking appropriate service providers to evidence their commitment to tackling inequalities in Oxfordshire through improving digital inclusion in public health commissioned services (grants, contracts, frameworks), such as outlining their approaches to addressing digital inclusion in tenders.	Public Health	Printed material providing public health advice at times of extreme weather events - both heat waves and cold weather - will be available to ensure that those households who do not have access to online advice can obtain public health information. Printed materials include bookmarks that can be handed out through the library service. The BHBH service has been evaluated to understand the impact and benefits of its home visiting and telephone services. Service users and the service provider have been involved in this evaluation which has helped to identify the importance of a home visit to people with complex needs.
	Include digital inclusion in impact assessments, to ensure that policies do not increase the digital divide.	Policy	This action is a work in progress. Questions relating to Digital Inclusion will be considered for inclusion in the new impact assessment tools that are being developed, rather than as a separate impact assessment.
	Promote internal collaboration around digital inclusion through restarting the Digital Inclusion Working Group, to monitor progress against the Digital Inclusion action plan.	Policy	The internal Digital Inclusion working group has been meeting and will continue to review the action plans each year.
	Use any social value provision from supplier contracts within the	Digital and IT	This action is a work in progress, and will continue into 24-25.

	Digital and IT directorate to improve digital inclusion and track the total value of such contributions.		
	Ensure that all Digital and IT projects involving a procurement include the technical requirements for accessibility.	Digital and IT	This action has been completed and will be business as usual going forward, as it is now built into governance documents.
	Investigate and understand new National Institute for Health and Care Excellence (NICE) guidelines on homelessness and Digital Inclusion, to ensure that people experiencing homelessness can access online health, universal credit, and social care information and are supported to use online services.	Adult Social Care	Work is in progress for this action, and will be reviewed for next year's action plan.

| Citizens of Oxfordshire are provided with a comprehensive, affordable, and accessible assistive technology offer that meets their needs. | Build on existing collaboration between Adult Social Care and iHub to develop and test innovative approaches to delivering and improving outcomes for vulnerable people, including investigating and promoting availability of Assistive Technology and technology enabled care equipment. | Adult Social Care iHub | This action is a work in progress, the innovation service sits on the Adult Social Care Digital board and input into new initiatives via this channel. |
| | Feature digital technology in accommodation development to increase independence. | Adult Social Care | Work is in progress for this action, and will be reviewed for next year's action plan. |
| Our Libraries and Heritage Service provides digital opportunities for people to connect and create, learn, and grow together. | Refresh public library IT provision (The People's Network) in all branches, to ensure local communities have high quality online access, printing facilities, and WiFi available in their local library. | Libraries | We are midway through a project to refresh our public library IT provision. We have been investigating various alternative hardware options, and are about to take that pilot phase into the public domain.

We are also exploring improved printing facilities, and have completed a project to update photocopier facilities across the network.

Libraries have continued to be part of the GigaHubs project, which has seenmultiple sites' connectivity markedly improved. |

| | | | We have updated staff PCs to enable swifter and more efficient customer service. |
| | | | We have also invested in and successfully implemented a new booking system that has allowed us to more effectively manage longer customer enquiries, especially those linked to council validations/transactions. |
| | Review and enhance Libraries' Makerspace and digital engagement activity offer, so that new technology and digital resources are open to all. | Libraries | We are in the process of investing in some new equipment for our Makerspaces and have also agreed to update our Coding equipment to better support our Code club activities.

We have recruited a new Group Library Manager, who has a background in digital engagement and we plan to review our approach in the coming months.

We have engaged in discussions with Getting Oxfordshire Online and Virgin Media to develop our digital support offer.

We have continued to delivery digital helper sessions in libraries across the county. |
| | Continue to grow the range of content and resources (including eBooks, eAudio, eMagazines and Newspapers, and e-Learning) that | Libraries | We have increased spending on online content and the proportional allocation to digital resources, given the growing demand in this area. |

			We have consistently reached new performance levels across eBooks, eAudio and eMagazines as the months have progressed – Digital loans now make c.10% of all lending activity, and we did >300k eBook and eAudio loans in 2022/23.
	are free to access anytime at home, on the move, or through local libraries, via free library membership.		We have marketed this material via our social media channels and have plans to further highlight this fantastic content.
	Assess the current range of support and training provided by Libraries to help customers get online and function in a digital world, and develop that offer and signposting activity as community needs and the digital landscape changes.	Libraries	Due to competing priorities we have not been able to undertake a substantial review of activity in this area to date. However, we have continued to deliver Digital Helper events at libraries across the network.
			We have engaged in discussions with Getting Oxfordshire Online and Virgin Media to develop our digital support offer.
			We have rolled out various digital training for Libraries staff to increase their knowledge and confidence (including on the subject of online safety).
			We have also highlighted to all libraries the recently redesigned 'Learn My Way' website from the Good Things Foundation, which provides free bite-sized learning for beginner digital skills but is

			also suitable for all levels of understanding. There is a Learn My Way desktop shortcut on every public library computer to make it easier for customers to get started.
	Develop the Heritage Search platform (launched in May 2023) to enhance access to, and understanding of, Oxfordshire's past and the wide range of heritage resources that the Council manages for future generations.	Heritage	The Heritage Search platform has proved hugely popular – in the first year, we received >20% increase in orders for copies of digital images from the site; we also registered 525k interactions in the period Oct 2022 – Aug 2023. With the addition of two new datasets (Peculiar Wills and Building Plans!) we hit the 1,000,000 figure for online catalogue records sooner than expected in November 2023. We are producing more digital content to go onto the site all the time (often with the help of volunteers) and are prioritising elements of the collection where there is the most demand. We have produced an introductory video guide to the site and done various engagement events focused on the platform. We carried out a wholesale update of the Oxfordshire School History website.

Section Three – Digitally Inclusive Workforce

Long-Term Ambition	Action	Directorate and Lead Officer Timescale	Updates
Technology that supports agile ways of working will facilitate communication and the ability to work well anywhere, any place, and at any time.	Embed digital inclusion in our facilities provision and ensure that new buildings are designed and built with the appropriate infrastructure in place for digitally inclusive service delivery and workplaces.	Property	This action is being reviewed to see if the ownership is correct and if it is appropriate to carry this over into the 24-25 action plan.
	All team leaders and business development officers to work alongside IT Business Partner when delivering, designing, on-boarding, or improving processes and services. Details should be included in the project scope document and the benefits realisation plans.	Customer Services	This action has been completed, as the programme has been running for 6 months since the end of 2022 to bring services into the contact centre.
Our staff, managers, and volunteers have the learning and	Ensure training and support for operational Facilities Management (FM) team on new IT systems rolled out within Property including frontline engineers	Property	This action is being reviewed to see if the ownership is correct and if it is appropriate to carry this over into the 24-25 action plan.

development opportunities to develop digital skills.	Work alongside Organisational Development colleagues to identify or procure relevant digital training for all Customer Service Centre staff. This should be delivered by the end of March 2024 to existing staff and included in induction for new staff.	Customer Services	This action has been completed and integrated into business as usual, as new colleagues are given digital training as part of induction.
	Investigate digital skills training for social care and frontline staff including social prescribers.	Adult Social Care	Work is in progress for this action, and will be reviewed for next year's action plan.

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Voluntary and Community Sector Action Plan 23/24

VCS Priority	Directorate	Service Area	Action	Update
Collaboration and Networking	People, Transformation and Performance	Children's Services	1.1 We will continue to ensure that our own workforce has the right information available to them for effective signposting and referrals to VCS organisations that can support our residents.	This action is now complete, and we have integrated it into business as usual.
	Communications, Strategy and Insight	Policy and Strategy	1.2 We will pro-actively support the Cabinet Member for Public Health and Inequalities in engaging and building relationships with the local VCS.	This action is now complete, and we have integrated it into business as usual.
	Communications, Strategy and Insight	Policy and Strategy	1.3 We will build on our relationship with the VCS sector, working with OCVA to establish regular OSCA (Oxfordshire Stronger Communities Alliance) partnership meetings.	To strengthen our relationship with the sector further, we will be looking to refresh and relaunch OSCA meetings in 24-25.
	Communications, Strategy and Insight	Policy and Strategy	1.4 We will oversee implementation of the VCS Strategy across the council and help ensure service area actions are delivered and reported on internally and to OSCA.	This action has been completed as part of the 23-24 action planning process and will become business as usual for 24-25.
	People, Transformation and Performance	Customers and Cultural Services – Libraries	1.5 We will commit to renewing our existing partnership agreements with volunteers and Friends Groups in acknowledgement of the critical support they provide to local library services. We will	We are currently in the process of completing the renewal of all existing partnership agreements. The terms of these agreements are being extended (from 1- or 2-year

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			explore widening this activity across the whole branch network.	arrangements, as was, to 3 years, as the general term) to demonstrate the service's and council's commitment to working with local communities to sustain and develop local library services. We are yet to explore the possible extension of Friends group arrangements.
	People, Transformation and Performance	Adult Social Care	1.6 We will continue to develop and build upon existing partnership structures within the Oxfordshire Way, such as Communities of Practice to extend the reach and range of community-led prevention strategies.	This action is in progress and has been integrated into business as usual. With the Integrated Care Board (ICB), we have supported the delivery of the well together programme. OCVA are the provider of the 2-year scheme, which is focused on the 10 most unequal areas in Oxfordshire. Communities of practice continue to deliver great sessions across the county supporting best practice in support of the Oxfordshire way (OCVA)

Voluntary and Community Sector Action Plan 23/24

	Environment and Place	Environment and Circular Economy	1.7 We will support the Community Action Group Network to deepen links with other relevant OCC teams to enhance and extend the impact of relevant projects, by holding and reporting on a minimum of two cross-departmental meetings per year.	We continue to support the CAG Network , with 3-4 big meetings each year, including colleagues from across different OCC departments (including establishing links to Circular Economy, and Community Wealth Building work).
	Public Health and Community Safety	Trading Standards	1.8 We will explore how we can best communicate and cascade consumer issues and advice to local community groups to improve resilience against fraud and consumer issues, identifying those groups or areas of the county who appear to be underrepresented in the available data we have.	This action has been completed. We have integrated this into business as usual and are currently performing above our corporate target. We have shared advice with community groups, and engagement has been carried out with community events as part of the electric blanket testing campaign. We are working closely with other partners in this space to ensure that there is not duplication.
Volunteering and Social Action	Communications, Strategy and Insight	Communications and Engagement	2.1 We will develop an external communications plan to promote the importance and benefits of volunteering in 2023/24, including events such as Volunteer Week.	This action is to be reviewed and agreed whether to roll over into 24-25 action plan.

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	Communications, Strategy and Insight	Communications and Engagement	2.2 We will develop an internal communications plan, in conjunction with HR, to promote the council's volunteering policy and volunteering opportunities, and celebrate the volunteering achievements of our employees.	We have embedded volunteering opportunities into our annual internal communications plan. In June every year we celebrate Volunteers' Week ([One in five people do this… | Oxfordshire County Council Intranet](#)) and we regularly promote volunteering opportunities.
	People, Transformation and Performance	Customers and Cultural Services – Libraries	2.3 We will widen participation and strengthen volunteer voices across our Libraries by exploring new development opportunities and celebrating the key role our volunteers play in delivering services for our residents.	We celebrated Volunteers week in June, by contacting all library volunteers and thanking them for their great work; and are due to meet up with community-supported libraries' volunteers in April 2024 to mark their contribution to the service. As noted in action 1.5, we have been actively meeting with Friends/Community groups to renew partnership agreements. We are in active discussions to extend and develop digital inclusion volunteer activities and Home Library Service.

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| | People, Transformation and Performance | Customers and Cultural Services – Museums and Heritage | 2.4 We will develop opportunities to broaden volunteer participation across Heritage services and work to better capture the benefits of volunteering in improving wellbeing and combatting loneliness. | As well as celebrating Volunteers week in June, we had a recognition celebration over Christmas to thank the Heritage services volunteers for their work.

We produced a regular Museum newsletter that goes out to volunteers and also actively contribute to the Friends newsletter too.

We have had positive meetings with the Swalcliffe Society, who support operations at Swalcliffe Barn, about how they can be better assisted and are developing the offer at this site.

We have regained accreditation status for all our Heritage sites (including The History Centre and The Oxfordshire Museum), and our returns detailed the work undertaken across the service by volunteers.

We still have work to do to capture the impact/benefits of volunteering. |
|---|---|---|---|---|

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				We have not yet broadened volunteer participation via digital channels, however volunteer effort is maintained at existing levels, which is vital to cataloguing and digitising output.
	Environment and Place	Environment and Circular Economy	2.5 We will further develop community volunteers through town and parish councils such as volunteer flood wardens, highways maintenance and school crossing patrols.	Work is in progress and this action is becoming business as usual. We finished the flood warden pilot at the end of March. We are currently receiving feedback, and this will be incorporated into business as usual. As of March 2024, we reached 10 volunteers for the pilot Flood wardens scheme.
Capacity and Skills	People, Transformation and Performance	Children's Services - Youth	3.1 We will offer £50,000 of our surplus apprenticeship levy to enable the development of a skilled youth workforce. 10 Youth Work Level 3 Apprenticeships will be funded through this offer.	We offered the apprenticeship levy to local VCS organisations working in the children's sector, however this was not taken up by any organisations.
	Public Health and Community Safety	Public Health	3.2 We will engage smaller VCS organisations in delivering domestic abuse training contracts	We have completed this action, with new contracts starting in April 2023.

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			for professionals and expanding the champions network for professionals and in local communities.	
	People, Transformation and Performance	Partnerships and Delivery	3.3 We will deliver grant support of £300,000 to strategic VCS advisory services to provide additional capacity	This grant funding has been provided to eight advice organisations within the County. It is being primarily used to boost the provision of debt and benefits advice. Monitoring is being collected on the provision of these services. One set of data has been submitted and the second is due in April.
	Environment and Place	Highways	3.4 We will train and develop 100 new FixMyStreet Super Users and network volunteers, over the next three years, across the County with the skills to support their local network and community. We will expand our work with communities in managing biodiversity sites.	This action is complete – as of March 2024 there are a total of 117 volunteer Fix My Street Users.
	Environment and Place	Environment and Circular Economy	3.5 We will support the Community Action Groups to engage local communities across the county on environmental topics by delivering community activities, training and information sharing through the Community Action Groups network. We will report on the number of activities and events	The report on CAG's activity from 23-24 will not be available until May 24.

For the project year April 22-March 23: CAG supported 4,297 activities, 84,883 participants, 97,613 volunteer hours, and £1,756,529 of |

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			delivered annually across our service areas including waste reduction, climate resilience, public rights of way and tree planting.	network fundraising and income generated.
Supporting a Sustainable Sector	Communications, Strategy and Insight	Policy and Strategy	4.1 We will refresh the Community Asset Transfer Policy.	Work to refresh the Community Asset Transfer Policy is in progress.
	Communications, Strategy and Insight	Policy and Strategy	4.2 We will promote the Councillor Priority Fund to the VCS and implement a more streamlined approach to administering the fund.	This action has been completed, and a LEAN review is currently underway to improve the process
	People, Transformation and Performance	Adult Social Care	4.3 We will work with NHS, District and City Council and the voluntary and community sector to develop social prescribing and community capacity and capability. This will include development of grant provision for anchor organisations and community groups to support people in the community and avoid admission to hospital or care placements.	Along with the City and Districts, Public Health, and the VCS, we have mapped the provision of "connectors" in the community. A further round of grant funding of community assets has been completed with Oxfordshire Community Foundation, OCVA and Community First Oxfordshire delivering grants to the value of 500k supporting 104 local community groups. This generated a further 120K of additional funding from local sponsors via OCF supporting

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				an additional 16 community groups. Local Area Co-ordination has been launched in two Localities (Bicester East and Chipping Norton) with support from West and Cherwell District Councils.
	Public Health and Community Safety	Public Health	4.4 We will work with VCS partners to co-produce our public health research governance processes and strategy. This will include setting up a Community Research Network and support/training for Community Research Champions.	We have established a Community Research Network and associated Community Steering Group. It is anticipated that the new Head of Research will lead on the development of a research strategy and governance framework with input from the VCS and other stakeholders when in post.
	People, Transformation and Performance	Partnerships and Delivery	4.5 We will partner with OCF to run a second round of VCS grants, providing a further £240,000 of funding to those groups supporting residents in the cost-of-living crisis.	We provided £110,000 to support the delivery of this £240k programme. We received an initial report following the award of grants to 32 organisations. A final report will be received in the spring of 2024 to provide feedback on delivery.

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	Environment and Place	Highways	4.6 We will explore the possibility of supporting the VCS by providing parking permits for volunteers that deliver core services across the county.	This action is to be reviewed and carried over into the 24-25 action plan if appropriate.
	Public Health and Community Safety	Trading Standards	4.7 We will promote Friends Against Scams as a community-led approach to scam harm reduction. In 2023/24, we aim to train 200 'Friends' across Oxfordshire communities to increase resilience against scams, with a view to prioritising a train-the-trainer approach in future years, recruiting 'Scam Champions' to take such learning into their communities.	Work is in progress on this action. As of the end of Q3 in 23/24, we have trained 156 Friends.
Reducing Inequalities	People, Transformation and Performance	Children's Services – Youth	5.1 We will ensure that the Department for Education (DfE) grant funding allocated to us each year is used to provide our Holiday Activities and Food programme (HAF), to support children from disadvantaged backgrounds and other vulnerable groups throughout school holidays.	Work is in progress on this action as part of current business as usual. DfE grant funding should continue until March 2025.
	People, Transformation and Performance	Customers and Cultural Services – Libraries	5.2 We seek to further develop the Home Library Service (HLS) with external funding and volunteers, to better support independent living, combat loneliness and widen	We have put in a funding bid to the current round of budget planning to expand the Home Library Service and are awaiting a decision on this

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			participation for residents, as well as monitor and celebrate volunteer impact and achieve improved sustainability.	front. We have continued to actively engage with our volunteers and maintained service levels at maximum capacity. We carry out a bi-annual survey of HLS customers to gauge satisfaction and identify areas for improvement.
	People, Transformation and Performance	Customers and Cultural Services – Museums and Heritage	5.3 We will work with local communities and partners to enhance engagement with heritage collections and increase participation, specifically addressing diversity, inclusion and underrepresented communities.	The History Service has worked with Film Oxford on projects focusing on highlighting under-represented community groups and their stories (e.g. African Caribbean residents, members of the LGBTQ+ community). We have restructured the Museums Team and created a Curator of Social History, and an Access and Engagement Manager post to give additional specialist capacity to work in this area. We are planning to undertake a museums collections development review, and establish a strategy for proactive collecting that will see an increase to the diversity of our heritage collections.

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				We have received Arts Council funding to assess the accessibility of our Museum services and have already started to make improvements off the back of evidence that is being generated by this review. An Accessibility Panel has been set up, and we have directly involved people with lived experience and specialist consultants.
Public Health and Community Safety	Public Health	5.4 We will support signposting to the VCS with the promotion of social prescribing and through the Better Housing Better Health service. The Better Housing Better Health service will provide training to the VCS on fuel poverty and potential solutions to residents.		Work is in progress for this action through the Better Housing Better Health service. In addition, the Community Outreach Active Travel programme is specifically targeted at supporting VCS in disadvantaged communities to address barriers people experience to cycling and walking more.
Public Health and Community Safety	Public Health	5.5 We will fund two VCS organisations to lead and deliver community insights reports to create the final two community profiles in 23/24, utilising the expertise and insight of our		This action has been completed. Oxford Glue carried out the community insight for the central Oxford profile and Community First Oxfordshire

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			partners to steer this essential strategic work.	carried out the community insight for the Littlemore profile. Both were published in December 2023.

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