



To: Members of the Cabinet

Notice of a Meeting of the Cabinet

Tuesday, 21 January 2020 at 2.00 pm

Rooms 1&2 - County Hall, New Road, Oxford OX1 1ND

A handwritten signature in blue ink, appearing to read 'Yvonne Rees'.

Yvonne Rees
Chief Executive

January 2020

Committee Officer: **Sue Whitehead**
Tel: 07393 001213; E-Mail: sue.whitehead@oxfordshire.gov.uk

Membership

Councillors

Ian Hudspeth	Leader of the Council
Mrs Judith Heathcoat	Deputy Leader
Lawrie Stratford	Cabinet Member for Adult Social Care & Public Health
Ian Corkin	Cabinet Member for Cherwell Partnership
Steve Harrod	Cabinet Member for Children & Family Services
Lorraine Lindsay-Gale	Cabinet Member for Education & Cultural Services
Yvonne Constance OBE	Cabinet Member for Environment
David Bartholomew	Cabinet Member for Finance
Mark Gray	Cabinet Member for Local Communities
Eddie Reeves	Cabinet Member for Transformation

The Agenda is attached. Decisions taken at the meeting will become effective at the end of the working day on unless called in by that date for review by the appropriate Scrutiny Committee. Copies of this Notice, Agenda and supporting papers are circulated to all Members of the County Council.

Date of next meeting: 25 February 2020

County Hall, New Road, Oxford, OX1 1ND

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Declarations of Interest

The duty to declare.....

Under the Localism Act 2011 it is a criminal offence to

- (a) fail to register a disclosable pecuniary interest within 28 days of election or co-option (or re-election or re-appointment), or
- (b) provide false or misleading information on registration, or
- (c) participate in discussion or voting in a meeting on a matter in which the member or co-opted member has a disclosable pecuniary interest.

Whose Interests must be included?

The Act provides that the interests which must be notified are those of a member or co-opted member of the authority, **or**

- those of a spouse or civil partner of the member or co-opted member;
- those of a person with whom the member or co-opted member is living as husband/wife
- those of a person with whom the member or co-opted member is living as if they were civil partners.

(in each case where the member or co-opted member is aware that the other person has the interest).

What if I remember that I have a Disclosable Pecuniary Interest during the Meeting?.

The Code requires that, at a meeting, where a member or co-opted member has a disclosable interest (of which they are aware) in any matter being considered, they disclose that interest to the meeting. The Council will continue to include an appropriate item on agendas for all meetings, to facilitate this.

Although not explicitly required by the legislation or by the code, it is recommended that in the interests of transparency and for the benefit of all in attendance at the meeting (including members of the public) the nature as well as the existence of the interest is disclosed.

A member or co-opted member who has disclosed a pecuniary interest at a meeting must not participate (or participate further) in any discussion of the matter; and must not participate in any vote or further vote taken; and must withdraw from the room.

Members are asked to continue to pay regard to the following provisions in the code that *“You must serve only the public interest and must never improperly confer an advantage or disadvantage on any person including yourself”* or *“You must not place yourself in situations where your honesty and integrity may be questioned.....”*.

Please seek advice from the Monitoring Officer prior to the meeting should you have any doubt about your approach.

List of Disclosable Pecuniary Interests:

Employment (includes *“any employment, office, trade, profession or vocation carried on for profit or gain”*.), **Sponsorship, Contracts, Land, Licences, Corporate Tenancies, Securities.**

For a full list of Disclosable Pecuniary Interests and further Guidance on this matter please see the Guide to the New Code of Conduct and Register of Interests at Members’ conduct guidelines.

<http://intranet.oxfordshire.gov.uk/wps/wcm/connect/occ/Insite/Elected+members/> or contact Glenn Watson on **07776 997946** or glenn.watson@oxfordshire.gov.uk for a hard copy of the document.

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, but please give as much notice as possible before the meeting.

AGENDA

1. Apologies for Absence

2. Declarations of Interest

- guidance note opposite

3. Minutes (Pages 1 - 12)

To approve the minutes of the meeting held on 19 November 2019 (**CA3**) and to receive information arising from them.

4. Questions from County Councillors

Any county councillor may, by giving notice to the Proper Officer by 9 am two working days before the meeting, ask a question on any matter in respect of the Cabinet's delegated powers.

The number of questions which may be asked by any councillor at any one meeting is limited to two (or one question with notice and a supplementary question at the meeting) and the time for questions will be limited to 30 minutes in total. As with questions at Council, any questions which remain unanswered at the end of this item will receive a written response.

Questions submitted prior to the agenda being despatched are shown below and will be the subject of a response from the appropriate Cabinet Member or such other councillor or officer as is determined by the Cabinet Member, and shall not be the subject of further debate at this meeting. Questions received after the despatch of the agenda, but before the deadline, will be shown on the Schedule of Addenda circulated at the meeting, together with any written response which is available at that time.

5. Petitions and Public Address

6. Service & Resource Planning Report - 2020/21 - January 2020 (Pages 13 - 16)

Cabinet Member: Finance

Forward Plan Ref: 2019/116

Contact: Hannah Doney, Strategic Finance Manager (Assurance & Reporting) Tel: 07584 174654

Report by Director of Finance (**CA6**).

This report is the culmination of the Service & Resource Planning process for 2020/21 to 2023/24 and sets out the Cabinet's proposed Corporate Plan and supporting budget, medium term financial plan, capital programme and supporting strategies.

The report is set out in three sections; the Corporate Plan; the revenue budget including the draft council tax precept for 2020/21 and the Medium Term Financial Plan (MTFP) to 2023/24; and the Capital & Investment Strategy and Capital Programme including the Treasury Management Strategy. Information outstanding at the time of the Cabinet meeting will be reported to Council when it considers the budget on 11 February 2020.

Cabinet's Corporate Plan and revenue and capital budget proposals take into consideration the latest information on the council's financial position outlined in this report and comments from the Performance Scrutiny Committee meeting on 9 January 2020.

The public consultation on the budget closes on 29 January 2020. The budget consultation report and any changes to the proposed budget as a result of comments received will be incorporated into the Service & Resource Planning 2020/21 – 2023/24 report to Council on 11 February 2020.

As final notification of some funding streams is awaited, some further changes may be made to the budget proposals ahead of full Council on 11 February 2020.

In relation to the Corporate Plan (Annex 1);

Cabinet is RECOMMENDED to RECOMMEND Council to:

- (a) approve the Corporate Plan.***

In relation to the Revenue Budget and Medium Term Financial Plan (Annex 2);

Cabinet is RECOMMENDED to:

- (a) approve the Review of Charges for 2020/21;***
(b) approve the Financial Strategy for 2020/21;
(c) approve the Earmarked Reserves and General Balances Policy Statement 2020/21; and
(d) to delegate authority to the Leader of the Council, following consultation with the Director of Finance and the Cabinet Member for Finance, to make appropriate changes to the proposed budget.

Cabinet is RECOMMENDED to RECOMMEND Council to:

- (a) approve a budget for 2020/21 and a Medium Term Financial Plan to 2023/24, based on the proposals set out in Annex 2 – Appendix 2;***
(b) approve a council tax requirement (precept) for 2020/21;
(c) approve a 2020/21 council tax for band D equivalent properties; and
(d) approve the virement arrangements to operate within the approved budget.

In relation to the Capital & Investment Strategy and Capital Programme (Annex 3);

Cabinet is RECOMMENDED to:

- (a) approve the Pupil Place Plan 2019/20 – 2023/24; and**
- (b) approve the Highways Asset Management Strategy for 2019/20 – 2023/24.**

Cabinet is RECOMMENDED to RECOMMEND Council to approve:

- (a) the Capital & Investment Strategy for 2020/21 - 2029/30 including:**
 - (i) the Investment Strategy;**
 - (ii) the Prudential Indicators; and**
 - (iii) the Minimum Revenue Provision Methodology Statement;**
 - (b) the new capital proposals for inclusion in the Capital Programme as set out in Annex 3 – Appendix C;**
 - (c) the Treasury Management Strategy Statement and Annual Investment Strategy for 2020/21 incorporated in the Capital & Investment Strategy;**
 - (d) to continue to delegate the authority to withdraw or advance additional funds to/from external fund managers to the Treasury Management Strategy Team;**
 - (e) that any further changes required to the 2020/21 Treasury Management Strategy be delegated to the Director of Finance in consultation with the Leader of the Council and the Cabinet Member for Finance;**
 - (f) the Treasury Management Prudential Indicators; and**
 - (g) The Specified Investment and Non Specified Investment instruments as set out in Annex 3 - Appendix F, paragraphs 47 to 52.**
- (6)(a) Annex 1 Corporate Plan_(Pages 17 - 42);**
(6)(b) Annex 2 Revenue Capital_(Pages 43 - 158);
(6)(c) Annex 3 Capital and Investment Strategy and Capital Programme_(Pages 159 - 390)

7. Business Management & Monitoring Report - November 2019 (Pages 391 - 436)

Cabinet Member: Deputy Leader of the Council and Cabinet Member for Finance
Forward Plan Ref: 2019/117

Contact: Steven Fairhurst Jones, Corporate Performance & Risk Manager Tel: 07932 318890/Hannah Doney, Strategic Finance Manager (Assurance & Reporting) Tel: 07584 174654

Report by Corporate Director Customers & Organisational Development and Director of Finance (**CA7**).

The report sets out Oxfordshire County Council's (OCC's) progress towards Corporate Plan priorities, and provides an update on the delivery of the Medium Term Financial Plan, at 30 November. A summary of overall performance and description of change is contained within the report. The report contains three annexes:

- Annex A shows our current performance against targets and summarises progress towards overall outcomes set out in our Corporate Plan.

- Annex B sets out the new Leadership Risk Register which has been developed as part of the Council's work to strengthen risk and opportunities management.

Annex C sets out the current financial position, providing detailed explanations of significant budget variations and an update on the Medium-Term Financial Plan including the delivery of savings agreed by Council in February 2019.

Cabinet is RECOMMENDED to:

- (a) note the contents of this report;***
- (b) note the virements set out in Annex C – 2b;***
- (c) approve the creation of a new Redundancy Reserve and approve the transfer of £1m from the Budget Priorities Reserve to the Redundancy Reserve as set out in Annex C.***

8. Council Tax Discount Scheme for Care Leavers (Pages 437 - 448)

Cabinet Member: Children & Family Services

Forward Plan Ref: 2019/207

Contact: Diane Cameron, Policy & Performance Officer Tel: 07795 301254

Report by Deputy Director – Children's Social Care (**CA8**).

This report is a draft proposed policy on establishing a joint Council Tax Discount Scheme for Care Leavers across Oxfordshire. The scheme is proposed to establish care leavers as a class for the purpose of Section 13A(1)(c) of The Local Government Finance Act 1992 and reduce their liability for council tax payments to nil between the ages of 18-21. Further arrangements on a case-by-case basis up to the age of 25 are proposed within the draft policy. A joint Memorandum of Understanding is also proposed and a draft is attached at Annex 1.

Cabinet is asked to note the contents of a draft joint policy proposing to establish a joint Council Tax Discount Scheme for Care Leavers, and to request appropriate officers respond to it ahead of a final policy being taken to all Oxfordshire authorities' Executives for approval ahead of implementation on 1 April 2020;

Cabinet is Recommended to approve that:

- (a) care Leavers are determined as a class for the purpose of Section 13A(1)(c) of The Local Government Finance Act 1992;***
- (b) all Oxfordshire Authorities and Thames Valley Police implement the Council Tax Discount Scheme for Care Leavers from 1 April 2020;***
- (c) all Oxfordshire Authorities and Thames Valley Police are signatories to a joint Memorandum of Understanding stating the joint commitment to the proposed scheme.***

9. Innovation and Sustainability Funds (Pages 449 - 480)

Cabinet Member: Adult Social Care & Public Health

Forward Plan Ref: 2019/120

Contact: Rebecca Lanchbury, Commissioning Officer (Older People) Tel: 07584 481255

Report by Deputy Director for Joint Commissioning (**CA9**).

The Innovation and Sustainability Funds were introduced in 2018, following the review of daytime support services and the implementation of a new, flexible countywide system of daytime support in Oxfordshire. The Innovation Fund for Daytime Support 2018-19 was open to applications from all community and voluntary organisations to deliver new innovative projects for daytime support in Oxfordshire.

This report is regarding the Innovation & Sustainability Funds for Daytime Support, administered by Adult Social Care to support the development of daytime opportunities for adults in Oxfordshire. This fund helps support people to live well at home and in their communities.

The aim of the sustainability funding is to provide support to existing services and the innovation funding is to provide one-off funding to support the development of self-sustaining projects, delivering new opportunities for adults in Oxfordshire.

This round of applications to the Innovation and Sustainability Funds opened on 12 August 2019 and the closing date for both funds was originally 20 September 2019. However, an unprecedented number of requests to extend the deadline resulted in an extension of the closing date to 30 September 2019.

Funding of £250,000 per annum is available through the Sustainability Fund from 2020/21 to 2022/23. We received 38 applications to this fund, requesting an overall amount of £370,634.30 in 2020/21. 30 applicants applied for funding over the 3-year period with further total requests of £282,499 in 2021/22 and £248,200 in 2022/23.

The Innovation Fund totals £123,265 in 2020/21, and we received 5 applications to this fund, requesting an overall amount of £63,097.00 in 2020/21.

The strategic plan is to move towards a rolling three-year programme of awards for the Sustainability Fund, whereby a third of the available funding is awarded each year to applicants requesting funding over a three-year period.

As per the agreed cross-party decision-making process, the cross-party panel reviewed the applications and assessed them against grant criteria. Decisions on recommendations for award were coproduced with people who use services, supported by officers pre-scoring.

This paper sets out the final cross-party panel recommendations for allocation of the Innovation and Sustainability Funds for Daytime Support 2020-21, for decision by Cabinet.

Cabinet is RECOMMENDED to:

- (a) approve the recommendations, as set out under 28 (a-b);**
- (b) approve the recommendation to transfer £40,138 from the Innovation Fund 2020/21 to the Sustainability Fund 2020/21, to cover the extra funding awarded, as set out under 28(c);**
- (c) to carry forward the remaining balance of £39,430 from the Innovation Fund 2020/21 to the Innovation Fund 2021/22, as set out under 28 (d).**

10. SEND LA Ofsted Report (Pages 481 - 488)

Cabinet Member: Education & Cultural Services

Forward Plan Ref: 2019/201

Contact: Jayne Howarth, Head of SEND Tel: 07776 996944

Report by Head of SEND (**CA10**).

The final SEND re-visit report was published by Ofsted on the 23 December 2019, following the revisit on the 15 - 17 October 2019. The findings of the report detail the outcome, which advised that the Local Area had made significant progress in three out of five areas of significant weakness, which was highlighted in the Ofsted SEND Inspection held in September 2017.

Cabinet is RECOMMENDED to note the outcome of the SEND Local Area Re-Visit report, published on the 23 December 2019.

11. Connecting Oxford (Pages 489 - 604)

Cabinet Member: Environment

Forward Plan Ref: 2019/061

Contact: Joanne Fellows, Infrastructure Locality Lead Tel: 07990 368897/Stewart Wilson, Principal Transport Planning Officer Tel: 07801 740354

Report by Director for Planning & Place (**CA11**).

The report outlines Connecting Oxford proposals - further traffic restrictions across Oxford and a workplace parking levy in Oxford's Eastern Arc - and the transport, environmental and other benefits it could deliver for Oxfordshire. A timetable and costs for the work required to design a detailed scheme and develop a DfT compliant business case, which will thoroughly assess a range of scheme benefits and impacts, are contained within the report. Initial proposals were recently subject to an extensive engagement exercise and the report confirms the main findings.

In addition, the report sets out the need for further consultation and engagement. It is proposed to develop a detailed scheme and business case between January/February 2020 and Autumn 2021. A decision is required on whether to proceed on this basis (with the necessary funding to undertake this work already secured from the Housing & Growth Deal).

The Cabinet is RECOMMENDED to endorse the overall approach proposed as the basis for further scheme and business case development of Connecting Oxford proposals in partnership with Oxford City Council.

12. Delegated Powers - January 2020

Cabinet Member: Leader of the Council

Forward Plan Ref: 2019/118

Contact: Sue Whitehead, Principal Committee Officer Tel: 07393 001213

To report on a quarterly basis any executive decisions taken under the specific powers and functions delegated under the terms of Part 7.2 (Scheme of Delegation to Officers) of the Council's Constitution – Paragraph 6.3(c)(i). It is not for Scrutiny call-in.

<i>Date</i>	<i>Subject</i>	<i>Decision</i>	<i>Reasons for Exemption</i>
10 October 2019	Request for exemption from tendering under Contract Procedure Rule ("CPR") 20 for a contract: Housing Related Support, Assessment Centre	Approved an exemption from the tendering requirements under OCC's Contract Procedure Rules to extend the Contract to Oxford Homeless Pathways for the Housing Related Support Assessment Centre for a 2-month period from to 31 March 2020 at a cost for the extension of £61,500 and an aggregate cost for the entire contract of £1,537,500.	To allow sufficient time for the new Contract for the Housing Related Support Assessment Centre to be procured, a short two - month extension of the existing Contract is required to enable the procurement process to be undertaken.
10 October 2019	Request for exemption from tendering under Contract Procedure Rule ("CPR") 20 for a contract in respect of a Contract for school services at Northfield School	Approved an exemption from the tendering requirements under OCC's Contract Procedure Rules in respect of a contract for the provision of school services at Northfield School by Gallery Trust at a cost of £420,000	To provide continuity of service to ensure safe delivery of education for pupils with high level and complex special educational needs. Urgent need caused by school failing to convert to academy as anticipated.
20 November 2019	Request for exemption from tendering under Contract Procedure Rule ("CPR") 20 in respect of the award of a Contract for House Project nominations agreement with Response.	Approved an exemption from the tendering requirements under OCC's Contract Procedure Rules in respect of the award of a contract to Response in respect of the House Project for a revised period from October 2018 to September 2022 at a cost for the entire period of £212,590	Due to the success of the project to allow the continuation of the pilot. Identification and sourcing of new properties and relatively small duration make the opportunity unattractive to other providers.

13. Forward Plan and Future Business (Pages 605 - 606)

Cabinet Member: All

Contact Officer: Sue Whitehead, Committee Services Manager Tel: 07393 001213

The Cabinet Procedure Rules provide that the business of each meeting at the Cabinet is to include "updating of the Forward Plan and proposals for business to be conducted at the following meeting". Items from the Forward Plan for the immediately forthcoming meetings of the Cabinet appear in the Schedule at **CA13**. This includes any updated information relating to the business for those meetings that has already been identified for inclusion in the next Forward Plan update.

The Schedule is for noting, but Cabinet Members may also wish to take this opportunity to identify any further changes they would wish to be incorporated in the next Forward Plan update.

The Cabinet is RECOMMENDED to note the items currently identified for forthcoming meetings.

CABINET

MINUTES of the meeting held on Tuesday, 17 December 2019 commencing at 2.00 pm and finishing at 2.50 pm

Present:

Voting Members: Councillor Ian Hudspeth – in the Chair
Councillor Mrs Judith Heathcoat
Councillor Lawrie Stratford
Councillor Ian Corkin
Councillor Lorraine Lindsay-Gale
Councillor Yvonne Constance OBE
Councillor David Bartholomew
Councillor Mark Gray
Councillor Eddie Reeves

Other Members in Attendance: Cllr Mark Lygo (Agenda Item 6)
Councillor Glynis Phillips (Agenda Items 7 & 8)
Councillor Laura Price (Agenda Item 9)

Officers:

Whole of meeting Yvonne Rees (Chief Executive); Lorna Baxter, Director of Finance; Nick Graham, Director of Law & Governance; Sue Whitehead (Law & Governance)

Part of meeting Item	Name
6	Claire Taylor, Corporate Director Customers and Organisational Development; Will Harper, Head of ICT
9	Claire Taylor, Corporate Director Customers and Organisational Development; Karen Edwards, Deputy Director HR

The Committee considered the matters, reports and recommendations contained or referred to in the agenda for the meeting, together with a schedule of addenda tabled at the meeting, and decided as set out below. Except insofar as otherwise specified, the reasons for the decisions are contained in the agenda, reports and schedule, copies of which are attached to the signed Minutes.

118/19 APOLOGIES FOR ABSENCE

(Agenda Item. 1)

Apologies were submitted by Councillor Steve Harrod.

119/19 MINUTES

(Agenda Item. 3)

The Minutes of the meeting held on 19 November 2019 were approved and signed as a correct record.

120/19 QUESTIONS FROM COUNTY COUNCILLORS

(Agenda Item. 4)

Seven questions with notice were asked. Details of the questions and answers and the supplementary questions and answers (where asked) are set out in Annex 1 to the Minutes.

121/19 PETITIONS AND PUBLIC ADDRESS

(Agenda Item. 5)

Mr Patrick Davey, presented a petition on behalf of residents, on the impact on St Barnards Road, of closing Walton Street South, Oxford

The Chairman received the Petition and referred it to the Strategic Director for Communities for consideration.

The following requests to speak had been agreed by the Chairman:

Item	Speaker
Item 6 – ICT Digital Strategy & Endorsement of Local Digital Declaration	Councillor Mark Lygo, Shadow Cabinet Member for Transformation
Item 7 – Business Management & Monitoring Report - September 2019	Councillor Glynis Phillips, Shadow Cabinet Member for Finance
Item 8 – Capital Programme Monitoring Report	Councillor Glynis Phillips, Shadow Cabinet Member for Finance
Item 9 – Staffing Report Quarter 2 July – September 2019	Councillor Laura Price, Opposition Deputy Leader

122/19 ICT STRATEGY, DIGITAL STRATEGY & ENDORSEMENT OF LOCAL DIGITAL DECLARATION

(Agenda Item. 6)

Cabinet considered a report setting out the Information Technology Strategy and the Framework for Digital Service Delivery and seeking approval to adopt and become a signatory on the Digital Declaration.

Councillor Mark Lygo, Shadow Cabinet Member for Transformation asked about the timescale for the Digital Declaration which he would want to see as soon as possible. Councillor Lygo asked for more detail on the finance information set out in the report and queried whether it would come to the Transformation Cabinet Advisory Group. He was advised that a meeting of the Group had already been set for January 2020

Councillor Eddie Reeves, Cabinet Member for Transformation in moving the recommendations introduced the contents of the report. Responding to the query from Councillor Lygo Councillor Reeves detailed the capital investment

and expected savings and reduction in ongoing revenue commitment. This would be built into the Medium Term Financial Plan.

Claire Taylor, Corporate Director for Customers and Organisational Development, responding to the query from Councillor Lygo on the Digital Declaration advised that it was about a commitment to the Declaration and that at this stage there was no specific timeframe. What was important was how it linked into how our services can be accessed. On the expected savings Ms Taylor added that an early assumption had been the development of one large new system. However, it was more important to sweat the existing assets and to use effectively the existing digital capability. The business case was the investment profile referred to by Councillor Reeve. If it was ever decided to go with a big new system, then a business case would be developed for approval.

During discussion Cabinet welcomed the proposals and thanked officers for their work. The opportunity to share the work with partners was welcomed. Cabinet highlighted the energy efficiency of the cloud-based systems with it being noted that since 2012 Microsoft had declared all their data centres were carbon neutral.

RESOLVED: to:

- (a) agree the proposed Information Technology Strategy and the Framework for Digital Service Delivery; and
- (b) adopt the Local Digital Declaration and become a signatory.

123/19 BUSINESS MANAGEMENT & MONITORING REPORT - OCTOBER 2019

(Agenda Item. 7)

Cabinet considered a report that set out Oxfordshire County Council's (OCC's) progress towards Corporate Plan priorities and provided an update on the delivery of the Medium Term Financial Plan from 1 October to 31 October 2019.

Councillor Glynis Phillips, Shadow Cabinet Member for Finance welcomed the clarity in identifying changes since the previous report (paragraph 13 refers) and welcomed the three improved indicators particularly that for the timeliness of Education & Health Care Plans (EHCPs). She noted that two indicators, those relating to the proportion of people walking/cycling and the levels of energy use had moved from green to amber. Councillor Phillips stressed that it was important to meet targets as they were linked to savings. Councillor Phillips referred to a number of indicators still causing concern including those relating to delayed discharges of care and unaccompanied asylum seekers. In terms of finance Councillor Phillips went on to highlight that 80% of savings were forecast to be met by year end and commented on the overspend in the High Needs Block due to the increase in EHCPs

Councillor Judith Heathcoat, Deputy Leader of the Council in introducing the business and risk elements of the report stated that the report gave a detailed picture against priorities in a transparent and timely way. It confirmed there was continuing good progress against targets. For the first time it included an annex on risk (Annex B). Councillor Heathcoat highlighted the work on electric blanket testing by Trading Standards and the Oxfordshire Fire & Rescue Service.

Councillor David Bartholomew, Cabinet Member for Finance introduced the finance element of the report.

Councillor Lawrie Stratford, Cabinet Member for Adult Social Care & Public Health referred to the position on delayed discharges of care. It was frustrating to be low in the league table relative to other local authorities. He did feel that the relative position was perhaps not how it was portrayed as he believed that the counting elsewhere was done differently.

The new Director was working well with the health service and steps were being taken to improve the reablement contract. Locally they did ensure that the time people were in hospital was shorter than in many other hospitals.

RESOLVED: to:

- (a) note the contents of this report; and
- (b) approve the virements set out in Annex C – 2a and note the virements set out in Annex C – 2b.

124/19 CAPITAL PROGRAMME MONITORING REPORT - OCTOBER 2019

(Agenda Item. 8)

Cabinet had before them the third capital programme update and monitoring report for the 2019/20 financial year that focused on the delivery of the capital programme based on projections at the end of October 2019 and new inclusions within the overall ten-year capital programme.

Councillor Glynis Phillips, Shadow Cabinet Member for Finance referred to the increased costs for the school expansion projects and sought assurance that the quotes were accurate and querying the level of confidence in the current quotes. Councillor Phillips also queried how confident the Cabinet Member was in the costs for the Legacy Programme.

Councillor David Bartholomew, Cabinet Member for Finance referring to the school expansion projects indicated that clearly when estimating there was always a risk involved. However, the risk had been minimised. On the Legacy Programme latest discussions indicated that the sum concerned was a generous amount and that everything should be accommodated within that figure.

Councillor Bartholomew introduced the contents of the report and moved the recommendations.

During discussion Cabinet supported the recommendation. In particular Cabinet welcomed the Milton Heights Bridge scheme that would improve facilities for cyclist and pedestrians across the County.

RESOLVED:

- (a) to approve the updated Capital Programme at Annex 2 and the associated changes to the programme in Annex 1c;
- (b) In relation to the Housing & Growth Deal to agree:
 - 1. the release of the Benson Relief Road scheme with a budget of £12.0m;
 - 2. the release of the Milton Heights Bridge scheme with a budget of £2.0m;
- (c) in relation to Schools to agree:
 - 1. the inclusion of the New Faringdon Primary School project in the Capital Programme with a budget of £10.9m;
 - 2. the inclusion of the New Primary School project in Wallingford in the Capital programme with a budget of £8.7m;
 - 3. the inclusion of the expansion project at Thame, Lord Williams's School in the capital programme with a budget of £4.5m;
 - 4. the release of the expansion project at Chalgrove Primary School in the Basic Need programme with a budget of £2.0m;
 - 5. the release of the expansion project at John Watson Special School (Secondary) in the Basic Need programme with a budget of £3.0m;
- (d) to agree the release of the Legacy Programme with a budget of £15.0m, and report the governance of these projects at a programme level.

125/19 STAFFING REPORT - QUARTER 2 - JULY - SEPTEMBER 2019

(Agenda Item. 9)

Cabinet considered a report that gave an update on staffing numbers and related activity during the period 1 July 2019 to 30 September 2019. It gave details of the actual staffing numbers at 30 September 2019 in terms of Full Time Equivalents. In addition, the report provided information on the cost of posts being covered by agency staff and a 4 year Agency Trend analysis.

Councillor Laura Price, Opposition Deputy Leader welcomed the narrative within the report that enabled readers to get under the actual figures to understand key challenges. Councillor Price referred to the agency staff funded by short term government grants and highlighted the need to monitor this area carefully. It was important to interrogate the outcomes to ensure that the Council was not becoming over reliant on grant funding that may not continue.

Councillor Price welcomed the reduction in agency funding by the Communities Directorate. However, she was alarmed at the unplanned demand increase and queried what was being done to address that.

Councillor Price also sought clarity on why some agency staff were being sourced directly rather than through Comensura.

Councillor Judith Heathcoat, Deputy Leader of the Council, in moving the recommendations introduced the contents of the report. Councillor Heathcoat commented that the report provided more effective trend analysis than previously. Responding to the points raised by Councillor Price, Councillor Heathcoat recognised that the figures for agency staff had risen slightly although spend was relatively stable. She agreed that the use of a single supplier had benefits including more competitive rates and strengthened control.

Councillor Corkin, Cabinet Member for Cherwell Partnership highlighted the number of shared posts referred to at paragraph 21 and 22 of the report and the continued commitment to joint working. Councillor Corkin also referred to a recent induction event for new staff that he had attended. He had been impressed with the interesting people he had met who had been challenging and questioning in a positive way.

Cabinet welcomed the refresh of the Cycle to Work Scheme and the removal of the limit on the loan available. This would enable free choice of the bike purchased including electric bikes. Members also highlighted the pool bike scheme that also included electric bikes.

RESOLVED: to note the contents of the report.

126/19 FORWARD PLAN AND FUTURE BUSINESS

(Agenda Item. 10)

The Cabinet considered a list of items for the immediately forthcoming meetings of the Cabinet together with changes and additions set out in the schedule of addenda.

RESOLVED: to note the items currently identified for forthcoming meetings.

..... in the Chair

Date of signing 2020

CABINET – 17 DECEMBER 2019

ITEM 4 – QUESTIONS FROM COUNTY COUNCILLORS

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Questions	Answers
<p>1. COUNCILLOR MARK CHERRY</p> <p>Noting the recent trials by Skanska, contractors of graphene enhanced asphalt road resurfacing near Witney, on the Oxfordshire County Council website and the cost savings to Oxfordshire County Council thereafter, of the new tarmac treatments - will the Cabinet member for Environment consider the next trials at Warwick Road in Banbury Ruscote. The Cabinet member will note a similar question as parts of the Warwick road continues to fail.</p>	<p>COUNCILLOR YVONNE CONSTANCE, CABINET MEMBER FOR ENVIRONMENT</p> <p>The recent trial using the Graphene material was undertaken at a location that was selected as it was already in the capital programme and was suitable for a trial to be undertaken.</p> <p>Although the issues in Warwick Road are known to officers it is not yet a confirmed scheme in the capital programme. I do note your appetite for a trial within your division, and I will ask officers to note this enthusiasm and progress similar trials if suitable opportunities arise.</p>
<p>2. COUNCILLOR MARK CHERRY</p> <p>Could the Cabinet member for Environment, Councillor Yvonne Constance urgently look at funding a strategy to stop grass verges and areas</p>	<p>COUNCILLOR YVONNE CONSTANCE, CABINET MEMBER FOR ENVIRONMENT</p> <p>I understand the problems and damage caused by vehicles parking and driving on verges. Unfortunately, given our current budget pressures, this isn't a priority for the highway service, particularly given the often high cost of</p>

Questions	Answers
<p>of land like Prescott close in Banbury Ruscote, being totally ruined by cars or vans in the winter time. Highway officer's hands are totally tied due to the lack of funding from Oxfordshire County Council. I feel long term strategy needs to be considered going forwards in the form of either bollards or parking bays.</p>	<p>installing bollards or parking bays. However, where there are specific areas causing a safety concern then officers will investigate to determine if there is a feasible and affordable solution.</p>
<p>3. COUNCILLOR MARK CHERRY</p> <p>Could the Cabinet member for Environment, Councillor Yvonne Constance urgently look at a different strategy on storm drainage in Banbury Ruscote. Currently FixMyStreet reports are made, quite rightly, by members of the public on blocked storm drainage, to local members for Ruscote or to officers. In essence, what's needed is a whole scale rolling maintenance programme, so that storm drainage gets pumped out yearly by OCC contractors, especially like parts of Warwick Road that has tree proximity, which over time is clogging up storm drainage that with heavy rainfall will consequently flood. Something needs to be done, as we will see more flooding with climate change'.</p>	<p>COUNCILLOR YVONNE CONSTANCE, CABINET MEMBER FOR ENVIRONMENT</p> <p>I am informed that officers are investigating where drainage issues have been reported and ongoing problems recognised. This work will include more than just clearing the gullies, but it will also involve ensuring the system is running effectively and removing any obstructions, such as tree roots.</p> <p>I have also asked officers to ensure that the scheduled gully emptying programme targets areas where there are known flooding issues.</p>

Questions	Answers
<p>4. COUNCILLOR CHARLES MATHEW</p> <p>Have you noticed the grubbiness of the road signs in Oxfordshire and do you not think that signs on major roads in the county at least should be cleaned twice a year, to uphold the pride of Oxfordshire County Council?</p>	<p>COUNCILLOR YVONNE CONSTANCE, CABINET MEMBER FOR ENVIRONMENT</p> <p>I agree that grubby road signs can be unsightly. Funding pressures do mean that we cannot clean signs routinely but I can assure you that statutory signs are cleaned when required so that people can move safely around the network. We are already working closely with our District and City colleagues as well as our local communities to see how we can resolve these issues and create a better look and feel for our local towns and villages. We do currently have a number of locations where this is happening across the county, and I am keen to see this approach extended further within a structured and safe working environment.</p>
<p>5. COUNCILLOR CHARLES MATHEW</p> <p>Should the abundance of commercial advertisements attached to or on OCC property (ie roads/signs) be subject to a monthly charge</p>	<p>COUNCILLOR YVONNE CONSTANCE, CABINET MEMBER FOR ENVIRONMENT</p> <p>Any commercial advertising does require planning permission and approval from the highway authority to ensure it is acceptable and safe. I agree it is worth exploring charging and will ask officers to investigate this, along with</p>

Questions	Answers
for use of those assets?	District Council colleagues, as well as looking at how we can ensure that any unapproved commercial advertising is removed. The agency agreement with Cherwell District Council allows the District to undertake the removal of illegal signage on the highways and also for then to manage the advertising on roundabouts in the local area. Where any illegal signage is on OCC property we will remove if the signage does not have the required permission, is inappropriate or deemed to create a highways related safety issue.
<p>6. COUNCILLOR CHARLES MATHEW</p> <p>Filming in Merton Street /Oriel Square, Oxford took place over two days in September this year by Pinewood Studios. How much were they charged for freeing of those areas from traffic?</p>	<p>COUNCILLOR DAVID BARTHOLOMEW, CABINET MEMBER FOR FINANCE</p> <p>£3069.75</p>
<p>7. COUNCILLOR JOHN HOWSON</p> <p>What discussions did the Cabinet member have with Councillors about the closure of Walton Street, and the possible extension of that closure, between 12th September - the date of her answer to my question on the subject - and the announcement of the extension of the closure for an experimental period of up to 18 months?</p>	<p>COUNCILLOR YVONNE CONSTANCE, CABINET MEMBER FOR ENVIRONMENT</p> <p>I can confirm that I relayed the request to consider an extension of the closure to officers, should such an opportunity arise. I was satisfied with this approach as the Experimental Order allows for continuous feedback from residents.</p> <p>We are now monitoring the impact of the closure on cyclists and other road users. I am aware that the current closure has caused issues within the Walton Manor area of your division and that Officers are working closely with</p>

Questions	Answers
	key residents and other internal teams to try and find a solution to the issues that are being experienced.
SUPPLEMENTARY	Responding to a query from Councillor Howson Councillor Constance explained that the experimental order functioned like a constant consultation and feedback was welcomed. Councillor Constance undertook to check on how the Pick-me-up Service may have been affected. In respect of bus services, if any funding for subsidised services became available the No 17 service would be considered but this was not likely.

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Division(s): N/A

CABINET – 21 JANUARY 2020

SERVICE & RESOURCE PLANNING 2020/21 – 2023/24

Report by the Director of Finance and Corporate Director Customers & Organisational Development

RECOMMENDATIONS

In relation to the Corporate Plan (Annex 1);

Cabinet is RECOMMENDED to RECOMMEND Council to:

(a) approve the Corporate Plan.

In relation to the Revenue Budget and Medium Term Financial Plan (Annex 2);

Cabinet is RECOMMENDED to:

- (a) approve the Review of Charges for 2020/21;**
- (b) approve the Financial Strategy for 2020/21;**
- (c) approve the Earmarked Reserves and General Balances Policy Statement 2020/21; and**
- (d) to delegate authority to the Leader of the Council, following consultation with the Director of Finance and the Cabinet Member for Finance, to make appropriate changes to the proposed budget.**

Cabinet is RECOMMENDED to RECOMMEND Council to:

- (a) approve a budget for 2020/21 and a Medium Term Financial Plan to 2023/24, based on the proposals set out in Annex 2 – Appendix 2;**
- (b) approve a council tax requirement (precept) for 2020/21;**
- (c) approve a 2020/21 council tax for band D equivalent properties; and**
- (d) approve the virement arrangements to operate within the approved budget.**

In relation to the Capital & Investment Strategy and Capital Programme (Annex 3);

Cabinet is RECOMMENDED to:

- (a) approve the Pupil Place Plan 2019/20 – 2023/24; and**
- (b) approve the Highways Asset Management Strategy for 2019/20 – 2023/24.**

Cabinet is RECOMMENDED to RECOMMEND Council to approve:

- (a) the Capital & Investment Strategy for 2020/21 - 2029/30 including:**
 - (i) the Investment Strategy;**

- (ii) the Prudential Indicators; and**
- (iii) the Minimum Revenue Provision Methodology Statement;**
- (b) the new capital proposals for inclusion in the Capital Programme as set out in Annex 3 – Appendix C;**
- (c) the Treasury Management Strategy Statement and Annual Investment Strategy for 2020/21 incorporated in the Capital & Investment Strategy;**
- (d) to continue to delegate the authority to withdraw or advance additional funds to/from external fund managers to the Treasury Management Strategy Team;**
- (e) that any further changes required to the 2020/21 Treasury Management Strategy be delegated to the Director of Finance in consultation with the Leader of the Council and the Cabinet Member for Finance;**
- (f) the Treasury Management Prudential Indicators; and**
- (g) The Specified Investment and Non Specified Investment instruments as set out in Annex 3 - Appendix F, paragraphs 47 to 52.**

Executive Summary

1. This report is the culmination of the Service & Resource Planning process for 2020/21 to 2023/24 and sets out the Cabinet's proposed Corporate Plan and supporting budget, medium term financial plan, capital programme and supporting strategies.
2. The report is set out in three sections; the Corporate Plan; the revenue budget including the draft council tax precept for 2020/21 and the Medium Term Financial Plan (MTFP) to 2023/24; and the Capital & Investment Strategy and Capital Programme including the Treasury Management Strategy. Information outstanding at the time of the Cabinet meeting will be reported to Council when it considers the budget on 11 February 2020.
3. Cabinet's Corporate Plan and revenue and capital budget proposals take into consideration the latest information on the council's financial position outlined in this report and comments from the Performance Scrutiny Committee meeting on 9 January 2020.
4. The public consultation on the budget closes on 29 January 2020. The budget consultation report and any changes to the proposed budget as a result of comments received will be incorporated into the Service & Resource Planning 2020/21 – 2023/24 report to Council on 11 February 2020.
5. The Final Local Government Finance settlement and confirmation of some other funding streams is still awaited, and therefore there may be further changes made to the budget proposals ahead of full Council on 11 February 2020.
6. As a consequence of relevant information to the setting of the budget and Medium-Term Financial Plan only being available after the date of this meeting, it is recommended that Cabinet delegate authority to the Leader of the Council, following consultation with the Director of Finance and the Cabinet Member for Finance, to make appropriate changes to the proposed budget.

Context/Framework for setting the 2020/21 Budget and Medium Term Financial Plan

7. In order to continue to deliver for our residents and thrive into the longer term, the Council must better manage demand and be more agile to respond to the ever-changing world around us.
8. This budget provides an opportunity for us to positively step-up to the challenge and demonstrate leadership of both the place and across the wider Oxfordshire system.
9. This budget includes proposals which through investment in some exciting new approaches will allow us to redesign our services, so we can shift our emphasis into more preventative support for our residents, businesses and communities. By grasping this opportunity to invest, we can start to drive improved outcomes and thus be ambitious for Oxfordshire – while critically putting the resident at the heart of our thinking.
10. To reflect this approach, rather than grouping the detailed proposed investments and pressures plus income and savings for 2020/21 and across the medium term are grouped by theme within each Directorate. These are:
 - Demographic pressures
 - Investment to manage demand
 - Essential investment
 - Invest to save
 - Income generation

Climate Action Implications

11. The Council has declared a climate emergency and stated the commitment to deliver zero net carbon emissions by 2030. Considering and responding to the climate emergency must be embedded in how the Council operates and in all services the Council delivers. This report provides an overarching framework for our ambitions to reduce carbon emissions, improve transport networks and support healthy communities as part of our commitment to tackle the issue of climate change.

Financial and Legal Implications

12. This report is mostly concerned with finance and the implications are set out in the annexes of the report. The Council is required under the Localism Act 2011 to set a council tax requirement for the authority. This report provides information which will lead to the council tax requirement being agreed in February 2020.

LORNA BAXTER
Director of Finance

CLAIRE TAYLOR

Corporate Director Customers & Organisational Development

Contact Officers: Annex 1 : Ben Threadgold – Policy & Performance Service
Manager
Tel: 07867 467838

Annex 2 & 3 : Hannah Doney – Head of Corporate Finance
Tel: 07584 174654

January 2020

Corporate Plan and Outcomes Framework

Context

1. An updated Corporate Plan 2020/2024 will be presented to Council for approval in February 2020, alongside the budget and Medium-Term Financial Plan.
2. As in previous years, a cross-party member working group has been established to inform the development of the refreshed plan. This is chaired by Cllr Heathcoat and is being consulted at key points in the development process.

Corporate Plan

1. The Corporate Plan is a key document for the Council, setting out our future strategic direction and how this will be delivered. A draft of this plan is attached as Annex 1 Appendix A.
2. It reflects the Council's vision of Thriving Communities for everyone in Oxfordshire, sets out our key priorities and how these will be achieved over the next four years.
3. The Corporate Plan forms part of a suite of documents that collectively communicate our priorities, how we will measure progress against them, the detailed service-based activities that will help to achieve our priorities, and a summary of progress in the previous year. These include:
 - Corporate Plan
 - Outcomes Framework (basis of monthly Business Management Reporting)
 - Service Delivery Plans
 - Annual Report
 - Council Tax leaflet
4. The attached draft of the Corporate Plan has retained the existing vision and priorities, with a view to a full plan review in the following year.
5. The document is slimmed down significantly to create more focus on our priorities and make it more accessible to residents, staff and other stakeholders. The document presents information in a more visual way, using infographics and specific examples to emphasise key points.
6. The draft also reflects the Council's increasing emphasis in certain areas, such as climate action, healthy place shaping and working in partnership – including with Cherwell District Council.

Outcomes Framework

7. An accompanying 'Outcomes Framework' sets out the way we measure progress towards the ambitions and priorities set out in the Corporate Plan. A draft of this Framework is attached as Annex 1 Appendix B.
8. This draft sets out the outcomes, indicators and measures we propose to use for corporate reporting in 2020-21.
9. This will form the basis of the performance information included within monthly Business Management Reports which Cabinet and the Performance Scrutiny Committee receives throughout the year.
10. The Outcomes Framework is also being reviewed and revised before the start of 2020-21 to ensure that we are able to measure and report on progress against the Council's up-to-date priorities.
11. This refreshed Outcomes Framework has sought to ensure it is more streamlined, with fewer outcomes, indicators and measures but to still be focused on demonstrating progress in achieving the key priorities of the Council.
12. Targets will be added to the draft Outcomes Framework during January and February. In some cases, final targets will be dependent on Q3 or year-end performance outturns before they can be confirmed.

Thriving communities for everyone in Oxfordshire

Corporate plan 2020-24



About this plan

Our Corporate Plan sets out our vision for thriving communities for everyone in Oxfordshire. It explains the priorities and focus for us to achieve our vision.

We live in a diverse and dynamic county with nearly 700,000 residents. Along with the historic city of Oxford and large town of Banbury, the county has a thriving network of villages and market towns. They are home to around 40% of the population, making Oxfordshire the most rural county in the south-east.

Our population is growing and, overall, we are a healthy and wealthy county. We know there are opportunities to make sure that all residents and communities in Oxfordshire have the same opportunities to thrive.

To achieve our vision, we focus on three 'thriving' themes: people, communities and economy. This Plan explains how we will realise our vision and how we measure progress.





Leader's foreword

Your county council is shaping Oxfordshire's future – along with our partners such as the NHS, district councils, businesses, universities, voluntary groups and, most importantly, communities themselves.

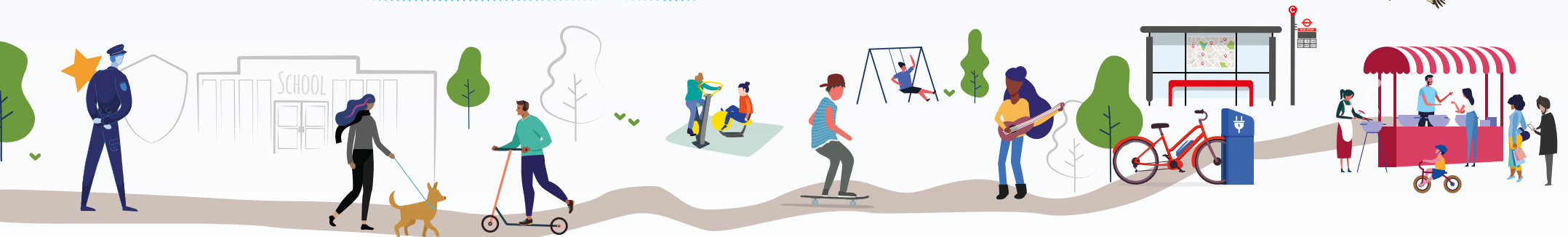
We are investing in a sustainable transport system so our local economy and public services can thrive and thus reduce ill-health, neglect and loneliness. That means helping individual people and creating better places to live for all – healthier places for thriving communities.

It's already happening in Bicester and Barton, and can happen across the county. I want to see 'inclusive growth' so everyone can enjoy the excellent quality of life in Oxfordshire.

Climate change is our other big priority, which influences everything we do. The county council has halved its carbon emissions since 2008; now we must get to zero by 2030. Our ambition is inspired by Oxfordshire's strong environmental credentials, with the best recycling rates in the country.

But these changes will only happen if we work together with communities. Please join us to shape a healthier Oxfordshire for everyone!

Councillor Ian Hudspeth
Leader of Oxfordshire County Council



Thriving communities for everyone in Oxfordshire

Thriving people

We strive to give every child a good start in life, and protect everyone from abuse and neglect.

We enable older and disabled people to live independently. We care for those in greatest need.

- Support families that need extra help to thrive.
- Improve educational attainment, including for children with special needs.
- Join up social care with the NHS to keep people out of hospital.
- Work with the police and others to keep young people safe.

Thriving communities

We help people live safe, healthy lives and play an active part in their community.

We provide services that enhance the quality of life in our communities, and protect the local environment.

- Design places that encourage healthy and active lives.
- Focus on the health gap between different communities.
- Reduce carbon emissions to tackle climate change and improve air quality.
- Encourage community-run services and self-help initiatives.



Thriving economy

We support a thriving local economy by improving transport links to create jobs and homes for the future.

- Secure government investment in transport and affordable housing.
- Maintain the county's roads and infrastructure.
- Connect rural homes and businesses to broadband.
- Promote Oxfordshire as a place to invest.

We listen to residents so we can continuously improve our services and provide value for money

- Improve customer service, particularly online.
- Involve people in designing better services.
- Work closely with our public, private and voluntary sector partners.
- Give communities more say in local services, such as libraries.

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Thriving communities

We help people live safe, healthy lives and play an active part in their community

Safe, healthy and active lives in Oxfordshire



We have high life expectancy: 81.6 for men and 84.6 for women.



Adults participating in physical exercise in Oxfordshire is higher than regional and national averages.



Smoking rates are down almost 5% to 10.7% of adults since 2013.

What we will do

- Focus on reducing the health gap between different communities.
- Encourage community-run services and self-help initiatives, amongst parish councils, town councils voluntary and community groups.
- Encourage people to live healthy lives and provide services which support healthy choices.
 - Help people to stay safe and well in their own homes.

Measuring success

- People are helped to live safe and healthy lives.
- People play an active part in their community.

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POTLIGHT ON...



Preventing drop-offs near schools to improve air quality

The school run is known to have a major impact on air quality around schools. Now several Oxford schools are working with the county council on a pilot project to restrict traffic outside schools.

The initiative follows a Friends of the Earth event hosted by the county council on Clean Air Day in June 2019, which led to several Oxfordshire schools asking to be part of the pilot. 'School Streets' has already been successfully trialled in other parts of the country.



The challenges

- There is a life expectancy gap of 7 years for men and 5 years for women in between the most and least deprived areas.
- Child poverty has increased from 9.8% in 2015 to 10.1% in 2016.
- 56% of people aged 18 or over in Oxfordshire are classed as overweight or obese.

CLIMATE CHANGE COMMITMENT

Increased walking and cycling will have a positive impact on climate change.

Supporting active lifestyles is essential to improving residents' health.



Thriving communities

We provide services that enhance the quality of life and protect the local environment

Quality of life & environment in Oxfordshire



Communities and volunteers support our 43 libraries.



We are the highest performing local authority area in England for recycling and waste management with more than 57% of our household waste recycled, composted or re-used.



Adults participating in active travel has increased from 40% to 44% since 2015/16.

What we will do

- Design places that encourage healthy and active lives, including cycling and walking routes.
- Provide library, cultural, museum and music services.
- Reduce carbon emissions from council buildings and activities.
- Respond to emergencies, maintain trading standards and safeguarding our residents.
- Help people stay safe on our roads.
- Protect the local environment.



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SPOTLIGHT ON...

Going electric

The drive to reduce carbon emissions stepped up a gear when the Fire and Rescue Service took delivery of a new fleet of electric cars and vans. In the longer term, the fire service expects that technology will enable electric fire engines.

The county council has already taken a strong lead and committed to being carbon neutral by 2030 and is in the process of replacing its general pool cars with rechargeable models, with three already in use.

The challenges

- We must respond to the climate emergency.
- Pressure on the highway network caused by high use of our 2,578 miles of road.
- We have precious natural resources to protect; such as 25 wildlife reserves, 122 protected species and 26% of land within Area of Outstanding Natural Beauty.
- Air quality is a particular issue in Oxford city.

Climate action will be prioritised in decision making and we will be carbon neutral by 2030.

Measuring success

- People are helped to live safe and healthy lives.
- Our quality of life in Oxfordshire is enhanced.
- Our local environment is protected and climate change tackled.




CLIMATE CHANGE COMMITMENT

Addressing air quality and reducing waste will have a positive impact on climate change.

Thriving people

We strive to give every child a good start in life and protect everyone from neglect

Children in Oxfordshire

-  Between mid-2016 to mid-2017 there were 7,537 births.
-  Proportion of pupils attaining a “strong” pass in English and Maths is above national averages at 46.6% (national average 43.2%).
-  Compared with England, Oxfordshire had a higher proportion of people aged 0-4, 15-19 and 20-24 2015/16.

What we will do

- Support families that need extra help to thrive.
- Improve educational attainment, including for children with special needs.
- Work with the police, schools and others to keep young people safe in their families and communities.
- Provide Children’s Social Care, including child protection, looked after children, adoption and fostering.

The challenges

- The need for children’s social care has risen. 80% rise in children in care since 2011.
- Those with Special Educational Needs and Disability support increased by 9% between 2017 and 2018.
- Census data suggests around 1,300 young people aged under 16 provide unpaid care in Oxfordshire.

Measuring success

- Children are given a good start in life.
- Children are able to reach their potential.

CLIMATE CHANGE COMMITMENT

Enabling schools to reduce their carbon emissions will have positive impact on climate change.

Providing early help is essential for families to thrive.

GOOD

Our Children’s Services are rated ‘Good’ by Ofsted.

POTLIGHT ON...

Helping families keep children safer

Children’s services is adopting a pioneering approach that will radically change the way children’s social care operates and start to reduce the growing number of children in care.

The new family safeguarding model involves children’s social workers working in small integrated teams. Centred around individual families in need, alongside experts providing specialist mental health, drugs and alcohol and domestic abuse services.



Thriving people

We enable older and disabled people to live independently and care for those in greatest need

Adults in Oxfordshire



Rural districts have a much higher proportion of older people compared to the city, 20% compared to 12%.



People live longer lives in good health than elsewhere in the country.



63,300 (15%) of people aged 16-64 have a disability that limits their ability to work.

What we will do

- Join up social care and the NHS through an 'Integrated Care System' to reduce the need for people to go to hospital and improve their healthcare experience.
- Provide support and care services for our residents as they live independently.
- Promote healthy lives for older people and support them to stay healthy, active and well.
- Ensure care services are good quality and reliable for the future.
- Support people to access travel and transport to enable them to live independently.

CLIMATE CHANGE COMMITMENT

Investing in community energy will have positive impact on climate change.

Measuring success

- Care services support independent living.

The challenges

- Population of over 85s is expected to increase by 34% by 2027.
- 18,071 carers reported by 66 (out of 70) GP practices in Oxfordshire in September 2019.
- Over 5,500 adults with learning difficulties and people aged 65+ supported by Adult Social Care.
- We have challenges with recruiting and retaining staff because of the relatively high cost of living in Oxfordshire.

Tackling our workforce challenge will help us support an increasingly older population.

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POTLIGHT ON...

Focusing on independent living

Adult social workers are taking a new 'strengths-based' approach to helping older and disabled people live as independent lives. They are focusing on a person's strengths rather than starting with 'needs', while making sure not to ignore the real challenges some people face.

The approach tries to draw out the persons own strengths and capabilities, and work with them to explore how their family, social network and available community resources can support and promote their well-being.



Thriving economy

We support a thriving local economy by improving transport links to create jobs and homes for the future

Oxfordshire's economy



Our economy generates £21.9bn of output per year from 400,000 jobs and more than 30,000 businesses.



6,830 apprenticeships started in Oxfordshire and 4,640 apprenticeships were completed in 2017-18.



Average earnings increased from £33,000 to £34,000 in 2018.

What we will do

- Secure government investment in transport and affordable housing.
- Connect rural homes and businesses to broadband.
- Promote Oxfordshire as a place to invest.
- Work with others to support skills development, business growth and employment.
 - Delivery of key infrastructure for Oxfordshire including highways and housing.

Measuring success

- Everyone has access to good homes and jobs.
- Businesses are able to grow and develop.
- People and communities have excellent transport and broadband connections.

The challenges

- Average house prices in Oxfordshire increased, making Oxford the least affordable city for housing.
- Rents are high and there is a demand for affordable housing.
- Our road network is under pressure with population growth.
- The rural nature of Oxfordshire, combined with 82% of residents working within the county, means roads are still essential for people to access work, school and other services.

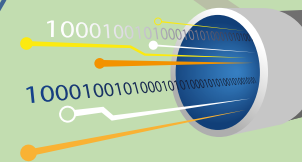
CLIMATE CHANGE COMMITMENT

Reprioritising road space for low carbon travel will have positive impact on climate change.

A connected Oxfordshire supports sustainable growth.

Improved bus and cycle routes on the A40

Bus users will benefit from a major scheme to address congestion on the A40 after the government confirmed a £102 million bid by the county council. The grant from the housing infrastructure fund (HIF) will be used to extend the A40 dual carriageway from Witney to the proposed Eynsham park and ride, including upgraded cycling facilities. There will also be access at Duke's Cut canal and railway bridges, extending the eastbound and westbound bus priority lane.



Climate Action

for a Thriving Oxfordshire

We will take climate action:

In our Organisation

- Make Climate Action a top priority in all decision making
- Make our corporate estate carbon neutral by 2030
- Maximise solar generation on our buildings and land
- Buy local green power for our estate
- Electrify our vehicles
- Support our staff to use zero carbon travel options
- Challenge our suppliers to match our ambition.

In Oxfordshire

- Manage land to capture carbon
- Enable schools to reduce their carbon
- Reduce carbon from your streetlighting
- Provide charging points for your electric car
- Invest in cycle paths and safe walking routes
- Reprioritise road space for low carbon travel
- Invest in community energy
- Support our communities to take Climate Action
- Team up with innovators to test new solutions
- Work with our partners so we all achieve more
- Keep you informed on our Climate Action plans and progress.

So together we can:

- Be part of a zero carbon future
- Have cleaner air
- Be more active
- Save money
- Collaborate and share
- Have more time
- Connect with each other
- Have comfortable buildings
- Be more resilient
- Have a stronger community and economy
- Be proud.



Healthy place-shaping or inequalities/inclusion

- What it means and what we are doing, covering inequalities, air quality, active lifestyles

Text, infographic and key points on inequalities to be added from the Director of Public Health Annual Report

DRAFT



Listening to residents and continuous improvement

SPOTLIGHT ON...

Councillor Priority Fund

Residents can influence local spending through their councillor. The Councillor Priority Fund enables councillors the opportunity to fund projects that matter most to their local community. The fund has successfully supported hundreds of local community projects over the last two years and is highly valued by our residents. Therefore, we have committed to continuing the fund for another year.

During 2018/19, there were over 170 different community and charity groups that received funding involving over 60 different towns and parish organisations.



What we will do

- Improve customer services, particularly online.
- Give communities more say in local services, such as libraries.
- Involve people in designing better services.
- Work closely with our public, private and voluntary sector partners.

Measuring success

- Our services improve.



We would like to hear from you:

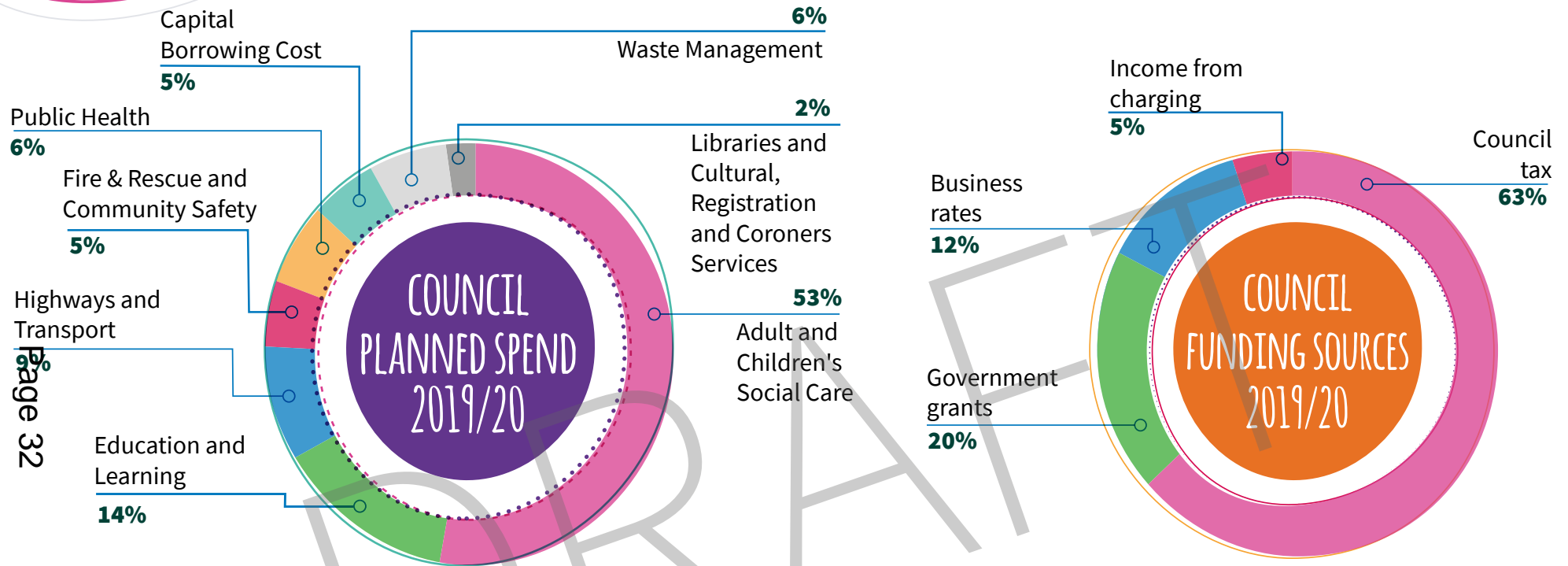
We have opportunities for you to feed in your views through our Facebook and Twitter pages, through your local Councillor, in public meetings and through our consultation. Find out more by going to: **[Link -TBC]**

Want to get more involved?

We have opportunities for volunteering and having a say in the services you receive. Contact **[Link -TBC]** for more information.



Providing the best value for public money



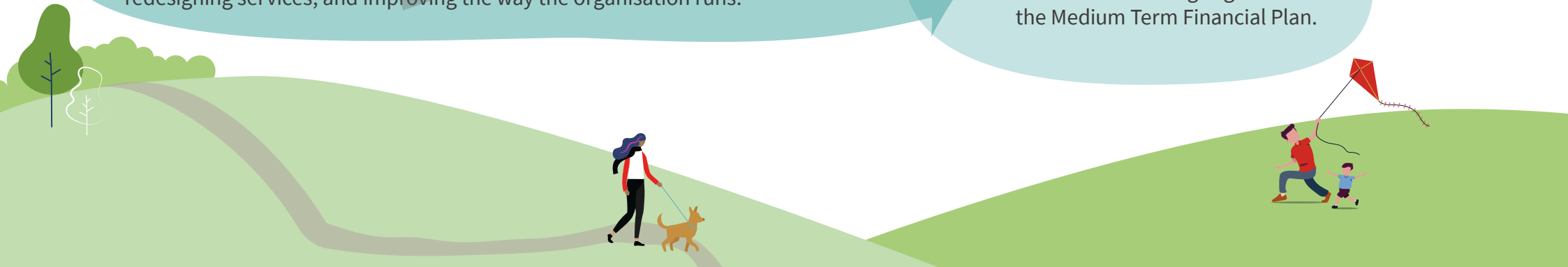
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Why we are changing

The council must be ready to meet future challenges, such as long-term financial pressures and growing demand for services. That means investing in prevention; redesigning services, and improving the way the organisation runs.

Measuring success

- We deliver value for money.
- We make the savings agreed in the Medium Term Financial Plan.



SPOTLIGHT ON...



Bringing customer service to communities

Oxfordshire's libraries do a lot more than simply offer books for loan. Our teams are now trained to help members of the public to access public services online, apply for a disabled parking permit and so much more. At our libraries, residents can enjoy a range of activities and events in a safe, community space. By broadening the library offer, Oxfordshire County Council can continue to operate a network of 44 libraries across the county, despite the pressure on local government finances.

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Actions list

We will work with partners to

- Engage with local people and organisations to understand what they need and how best to support them to meet these needs.
- Work through our councillors to understand local issues and priorities.
- Develop a new approach to working in different localities across Oxfordshire that improves people's lives and addresses inequalities.



WORKING WITH PARTNERS ACROSS OXFORDSHIRE

- We work collectively with parents to achieve the best possible outcomes, including the NHS to improve health and social care; the police and probation service to keep people safe; business innovators to improve travel in the county, and the voluntary and community sector to understand and meet local needs.
- We also work with other councils across Oxfordshire, and beyond, including our unique partnership with Cherwell District Council. Staff across both councils are constantly finding new ways to improve services and reduce costs.
- We are addressing long-term challenges, from childhood obesity to supporting an ageing population. Services serving the same customers, such as leisure and libraries, and trading standards and environmental health, work more closely together than ever before.
- Savings of nearly £1m have already been made or are in the pipeline as a result of joint management arrangements.
- We want to improve partnership working with the other Oxfordshire districts to improve outcomes and customer experience.

Investing in the digital future

We are investing in digital technology to reduce costs and improve services to our residents. Our new ICT strategy focuses on improving online services. Not everyone can access our services online, but those who expect to be able to do so will start to see big improvements.

A new online Blue Badge application process with credit card payments launched earlier this year. Since then, nearly 70% of applications are made online - previously it was 40%.



To find out more about how you can take part in local democracy by asking questions or making statements at council meetings, visit:
www.oxfordshire.gov.uk/council

Have your say in consultations about changes to council services or policies at:
www.consultations.oxfordshire.gov.uk





You can apply, book, find, report and pay for a range of services on the County Council website:
www.oxfordshire.gov.uk



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WE LISTEN TO RESIDENTS SO WE CAN CONTINUOUSLY IMPROVE OUR SERVICES AND PROVIDE VALUE FOR MONEY			
OUTCOME	INDICATOR	MEASURE	
Our services improve	Improvement following audit or inspection	Proportion of actions dealt with on time after external inspection or audit	
		The proportion of social care providers rated as 'outstanding' or 'good' by the Care Quality Commission in Oxfordshire remains above the (monthly) national average (84% in Apr 19)	
	Listening to residents	% of Residents' Survey respondents who: a) say local people can influence us b) are satisfied with the way we run things c) say we act on their concerns	
		Current status of pothole enquiries reported on FixMyStreet during the calendar month prior to reporting date	
		A new approach to localities working improves engagement with local communities and responds to local needs	
		Digital transformation – increase the number of services that can be accessed / paid for online	
		Customer experience – routine satisfaction measures and publication of our improvement actions	
We deliver value for money	The Council is financially resilient	Financial indicators contained in the Financial Strategy are on track	
		General balances remain at or above the risk assessed level	
	Effective financial management and governance	Directorates deliver services and achieve planned performance within agreed budget	
		Capital projects are delivered on time and within budget	
		Systems and processes operate effectively and are well controlled to reduce and detect error and fraud.	
	Using our assets effectively to deliver services to our residents	Review the operational estate with services and realign portfolios and assets with the requirements defined by the service, ensuring assets are appropriate and adequate for purpose	
		Work positively with partners to facilitate greater integration for space sharing and reducing overall costs to the public sector	
		Ensure the estate contributes to the Council's income through ensuring its investment portfolio and surplus estate perform to agreed criteria	

WE HELP PEOPLE LIVE SAFE AND HEALTHY LIVES AND PLAY AN ACTIVE PART IN THEIR COMMUNITY			
OUTCOME	INDICATOR	MEASURE	
People are helped to live safe and healthy lives 9636	Numbers of people helped to live safe and healthy lives	Number of safe and well visits that help vulnerable children and adults to live more secure and independent lives	
		Number of children better educated to live safer and healthier lives	
		% of eligible population 40-74 who have been <u>invited</u> for an NHS Health Check since April 2017	
		% of eligible population 40-74 who have <u>received</u> an NHS Health Check since April 2017	
		Numbers of people walking or cycling increase, based on the baseline for Oxfordshire in the Government's Active Lives Survey	
		Delivery of supported housing pathway	
	Timeliness of emergency response	More people alive as a result of our "365 Alive" prevention, protection and emergency response activities	
		% of emergency call attendances made within 11 minutes	
		% of emergency call attendances made within 14 minutes	
	Numbers of people receiving support to stop smoking or for drug and alcohol dependency	Rate of successful quitters per 100,000 smokers 18+ (reported a quarter in arrears)	
		Number of users of OPIATES that left drug treatment successfully (free of drug(s) of dependence) who do not then re-present to treatment again within 6 months as a percentage of the total number of opiate users in treatment.	
		Number of users of NON-OPIATES that left drug treatment successfully (free of drug(s) of dependence) who do not then re-present to treatment again within 6 months as a percentage of the total number of non-opiate users in treatment.	
		Number of users of ALCOHOL ONLY that left treatment successfully (free of alcohol dependence) who do not re-present to treatment again within 6 months as a percentage of the total number of ALCOHOL ONLY users in treatment.	

WE PROVIDE SERVICES THAT ENHANCE THE QUALITY OF LIFE AND PROTECT THE LOCAL ENVIRONMENT			
OUTCOME	INDICATOR	MEASURE	
Our quality of life in Oxfordshire is enhanced	Condition of highways	Defects posing immediate risk of injury are repaired within 24 hours	
		Defects creating potential risk of injury repaired within 28 calendar days	
		The delivery of XX km of road re-surfacing across the county / broken down by district	
	Participation in cultural services	Increase in the number of community and cultural programmes/events/attendees at events/activities hosted by Cultural Services (Museums, History, Archives and Library Services)	
		Reach the upper quartile in the CIPFA (Chartered Institute of Public Finance and Accountancy) benchmarking comparison group for active library users, website visits, book issues, physical visits	
		Number of volunteer hours per month contributed to a) the History Service and b) the Museum Service	
		Number of volunteer hours contributed to libraries to support delivery of specific programmes	
Our local environment is protected and climate change is tackled	Oxfordshire's land is protected	50% of Mineral and Waste applications are determined within 13 weeks	
		% of highway maintenance construction, demolition and excavation waste diverted from landfill	
	Reduction in carbon equivalent emissions from Council estates & activities	Yearly reduction in carbon equivalent emissions from Council estates & activities (Carbon Neutral by 2030)	
		Percentage of our energy generated from renewables on our buildings and land	
		Schools supported to reduce their carbon impact by [xx %] OR (dependent upon resource) Number of schools receiving support from OCC to reduce emissions	
	Reduced carbon impact of our transport network	Increase % of streetlights fitted with LED lanterns by March 2021	
		Progress with reduction of traffic congestion	
		Numbers of OR proximity to electric vehicle charging points	
		Numbers of staff who have accessed the Cycle to Work scheme	
	Air quality	District councils' air quality monitoring [quarterly]	
		Decrease in the carbon impact of Council's fleet OR Increase % of electric vehicles within OCC Fleet OR Decrease the carbon impact of staff business mileage	
		% of household waste a) recycled, b) composted and c) re-used (and total %)	

	Household waste re-used, recycled or composted	% of household waste sent to landfill. Reported performance is the forecasted end of year position.	
		% of household waste recycled, composted and re-used at our Household Waste Recycling Centres (HWRCs).	

WE STRIVE TO GIVE EVERY CHILD A GOOD START IN LIFE AND PROTECT EVERYONE FROM NEGLECT				
OUTCOME	INDICATOR	MEASURE		
Children are given a good start in life Page 39	Prevalence of healthy children	Number of expectant mothers who receive a universal face to face contact at 28 weeks		
		Percentage of births that have received a face to face New Birth Visit		
		Percentage of children who received a 12-month review		
		Percentage of children who received a 2-2½ year review		
		Babies breastfed at 6-8 weeks of age		
		% of mothers receiving a Maternal Mood Review in line with the local pathway by the time the infant is aged 8 weeks.		
	Number of looked after children	Safely reduce the number of looked after children by [target tbc] to bring it nearer to the average of our statistical neighbours during 2020-21		
		Number of children's social care assessments		Increase the number of early help assessments to [target tbc] during 2020-21
				Not to exceed the level of social care assessments in 2019-20
	Number of child protection plans	Maintain the number of children who are the subject of a child protection plan to the average of our statistical neighbours during 2020-21		
Children are able to reach their potential	Ofsted rating of schools	% of primary schools rated good/outstanding by Ofsted		
		% of secondary schools rated good/outstanding by Ofsted		
	Children missing education	Persistent absence rates in primary schools (%)		
		Persistent absence rates in secondary schools (%)		
	Timeliness of completing Education, Health and Care Plans	Increase the proportion of Education, Health and Care Plans (EHCPs) that are completed within 20 weeks, to be above the national average by March 2021		
		Increase the number of completed Education, Health and Care Plans (EHCPs) as a proportion of the total number of children in Oxfordshire with Special Educational Needs and Disability		

WE ENABLE OLDER AND DISABLED PEOPLE TO LIVE INDEPENDENTLY, AND CARE FOR THOSE IN GREATEST NEED			
OUTCOME	INDICATOR	MEASURE	
Care services support independence at living	People needing short-term support can access an effective service	Maintain the number of hours of reablement delivered to 5,750 per month	
		Number of people receiving reablement	
		% of people who need no ongoing care after the end of reablement	
	Number of people with control over their care	% of people with safeguarding concerns who define the outcomes they want	
		Number of people with personal budgets remains above the national average	
		% of people aged over 65 using social care services who receive a direct payment remains above the national average	
		% of people aged under 65 using social care services who receive a direct payment remains above the national average	
	Number of people delayed leaving hospital	Reduce the TOTAL number of people delayed in hospital	
		Reduce the number of people delayed in hospital awaiting HEALTH CARE	
		Reduce the number of people delayed in hospital awaiting SOCIAL CARE	
		Reduce the number of people delayed in hospital awaiting BOTH HEALTH AND SOCIAL CARE	
	People needing social care are supported to stay in their own home	Maintain the number of home care hours purchased per week	
		Reduce by x% the number of people aged 18-65 entering permanent residential care (vs. OCC rates of previous 3 years)	
		Ensure the % of working age (18-64) service users with a learning disability support, who are living on their own or with their family, remains above the national average (76%)	
		Increase from 57% the percentage of older people in long term care who are supported to live in their own home	
		The number of older people with care needs moving in to affordable rented Extra Care Housing units in that month.	

WE SUPPORT A THRIVING LOCAL ECONOMY BY IMPROVING TRANSPORT LINKS TO CREATE JOBS & HOMES FOR THE FUTURE					
OUTCOME	INDICATOR	MEASURE			
Everyone has access to good homes and jobs	Infrastructure delivery supports growth	Funding secured as % of yearly investment required to bring the condition of all highway assets into good condition (identified in the Highway Investment Business Case)			
	Number of new homes	We support the delivery of [target tbc] new affordable housing starts by March 2021			
Businesses are able to grow and develop	Support for a strong local economy	Number of businesses given support by Trading Standards interventions or fire risk inspections			
		We participate in 20 innovation funding bids to support the Smart Oxford programme			
Page 4 People and communities have excellent transport and broadband connections	Levels of disruption to journeys	Failed utility inspections to be no higher than 15%			
		Reduction in number of days of works on highway			
	Level of public transport satisfaction and use	Increase use of public transport in Oxfordshire <u>over baseline</u> as follows: Bus: DfT annual statistics for bus use in Oxfordshire: <ul style="list-style-type: none"> • Bus journeys • Bus use per head Bus: Transport Focus Autumn 2018 Bus Passenger Survey for Oxfordshire <ul style="list-style-type: none"> • Satisfaction with overall journey Rail: Dec 2018 Oxfordshire Station use, per Office of Rail & Road statistics			
		Enhanced digital connectivity for residents and businesses	The number of premises we have enabled to have access to superfast broadband within Oxfordshire, via our contracts with BT and Airband		
			The % of premises in Oxfordshire with access (via either our contract or commercial providers) to superfast/ultrafast/full fibre broadband		
			The % of premises in Oxfordshire without access to: <ul style="list-style-type: none"> • At least Basic Broadband (at least 2Mb/s) • OFCOM 'acceptable' broadband (10Mb/s) 		

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SERVICE & RESOURCE PLANNING 2020/21 – 2023/24 Revenue Budget and Medium Term Financial Plan

Executive Summary

1. This annex sets out the draft council tax precept for 2020/21, the revenue budget for 2020/21 and the Medium Term Financial Plan (MTFP) to 2023/24. It should be read in conjunction with the Corporate Plan annex and Capital & Investment Strategy annex of this report.
2. The Cabinet's budget proposals take into consideration the latest information on the council's financial position outlined in this report and comments from the Performance Scrutiny Committee meeting on 9 January 2020. Information outstanding at the time of the Cabinet meeting will be reported to Council when it considers the budget on 11 February 2020.
3. The public consultation on the budget closes on 29 January 2020. The budget consultation report and any changes to the proposed budget as a result of comments received will be incorporated into the Service & Resource Planning 2020/21 – 2023/24 report to Council on 11 February 2020.
4. The Final Local Government Finance settlement and confirmation of some other funding streams is still awaited, and therefore there may be further changes made to the budget proposals ahead of full Council on 11 February 2020.
5. As a consequence of relevant information to the setting of the budget and Medium-Term Financial Plan only being available after the date of this meeting, it is recommended that Cabinet delegate authority to the Leader of the Council, following consultation with the Director of Finance and the Cabinet Member for Finance, to make appropriate changes to the proposed budget.
6. Charges levied by the council have been reviewed in line with the Corporate Charging Policy and are set out in detail at Appendix 8. Additional income expected for 2020/21 as a result of these changes in price or volume are reflected in the schedule at Appendix 2.

Introduction

7. The service & resource planning report to Council in February will be set out in four sections:
 - Section 1 – Leader of the Council's overview
 - Section 2 – Corporate Plan
 - Section 3 – Chief Finance Officer's statement on the budget
 - Section 4 – Budget Strategy
8. This annex forms part of Section 4 to that report. In addition, this annex sets out for approval the review of charges. The following appendices are included:

Appendix 1	Draft Medium-Term Financial Plan (MTFP) 2020/21 – 2023/24
Appendix 2	Investments and Pressures & Income and Savings proposals 2020/21 – 2023/24 (including those agreed in previous MTFPs)
Appendix 3	Draft Council Tax 2020/21
Appendix 4	Virement Rules for 2020/21
Appendix 5	Financial Strategy 2020/21
Appendix 6	Earmarked Reserves and General Balances Policy Statement 2020/21
Appendix 7	Earmarked Reserves 2019/20 – 2023/24
Appendix 8	Review of Charges 2020/21
Appendix 9	Overarching Social and Community Impact Assessment
Appendix 10	Comments from Performance Scrutiny Committee

Overview and advice from the Chief Finance Officer

9. Under Section 25 of the Local Government Act 2003, the Chief Finance Officer (Director of Finance) is required to report on the robustness of the estimates made in determining the council tax requirement and on the adequacy of the proposed financial reserves. This assessment will be included in Section 3 of the report to Council in February 2020.
10. CIPFA recently published a new Financial Management Code, which authorities are required to comply with by 2021/22. The Code clarifies how Chief Finance Officers should satisfy their statutory responsibility for good financial administration as required in section 151 of the Local Government Act 1972. More details are set out in the Financial Strategy at Appendix 5.

Summary of Draft Budget 2020/21 and Medium Term Financial Plan to 2023/24

11. In September 2019, Cabinet agreed that the Medium Term Financial Plan (MTFP) to be agreed by Council on 11 February 2020 would cover the four years 2020/21 to 2023/24. A draft MTFP for 2020/21 to 2023/24 is set out in Appendix 1, this is based on the latest information on financing available to the Council following the Provisional Local Government Finance Settlement plus the investments and pressures & income and savings proposals as set out in Appendix 2 to this annex.
12. The effect the proposals in this report have on the overall revenue financial position is to provide a balanced budget for 2020/21. The funding position beyond 2020/21 is not known and will be dependent on the Spending Review due in 2020; the implementation of the Fair Funding Formula; the introduction of 75% Business Rates Retention and the reset of Business Rates. As set out in the Financial Strategy, due to the uncertainty, the working assumption is that much of the one-off funding will not continue beyond 2020/21. Therefore, a shortfall of £25.1m is forecast for 2021/22.
13. Appendix 3 provides a draft of the council tax calculation including the council tax requirement for 2020/21 and the Band D council tax equivalent.

Provisional Local Government Finance Settlement

14. The Provisional Local Government Finance Settlement for 2020/21, was announced by the Secretary of State for Housing, Communities and Local Government, Robert Jenrick, on 20 December 2019. The publication of the Draft 2020/21 Local Government Finance Report was the start of a consultation period that will end on 17 January 2020. The final settlement is therefore expected in early February 2020.
15. This year's Local Government Finance Settlement follows the publication of the Spending Round for 2020/21 in early September 2019 and the 2020/21 Local Government Finance Settlement: Technical Consultation which closed in October 2019.
16. The key aspects of the Provisional Local Government Finance Settlement are set out below.

Settlement Funding Assessment

17. The Government has confirmed the outcome of the Technical Consultation to remove negative Revenue Support Grant (RSG). This is reflected in the overall Settlement Funding Assessment figure of £72.0m which comprises RSG and Business Rates. This is £7.3m more than assumed in the MTFP due to the removal of negative RSG.

Social Care Funding

18. The proposals outlined in the technical consultation for Improved Better Care Fund, Winter Pressures Grant, Social Care Support Grant, and the additional Social Care Funding of £1bn have been confirmed.
19. The Government has confirmed the continuation of the Improved Better Care Fund (iBCF) at 2019/20 levels in 2020/21. The Council received £8.1m of iBCF in 2019/20. As set out in the technical consultation, the Winter Pressures Grant has been added to the (iBCF) in order to remove the Winter Pressure Grant ringfence. Allocations are the same as 2019/20. For Oxfordshire this was £2.3m. In total therefore, the iBCF allocation for 2020/21 will be £10.4m. As with 2019/20, the iBCF must be pooled into the Better Care Fund.
20. The distribution of the additional £1bn social care funding allocates £850m based on Adult's Relative Needs Formula, with the remaining £150m used to equalise the distribution of the adult social care precept, using the current improved Better Care Fund equalisation methodology. The Council's share of the £1bn is confirmed at £8.1m. In addition, the £410m Social Care Support Grant received in 2019/20 will continue into 2020/21. The Council's share of this is £3.9m. The total Social Care Grant of £12.0m is un-ringfenced with no conditions attached. There is no prescription regarding the proportions of the grant which should be allocated to children and the proportion allocated to adults.

New Homes Bonus

21. The Local Government Finance Settlement Technical Consultation proposed to continue with the top-slice of revenue Support Grant to fund New Homes Bonus payments for a further year in 2020/21. Legacy payments will continue for payments relating to prior years¹, however allocations for 2020/21 will not result in legacy payments in subsequent years. The existing MTFP assumed income would reduce from £3.6m in 2019/20 to £2.9m in 2020/21. The Provisional Local Government Finance Settlement set out indicative allocations for 2020/21 of £4.1m, £1.2m more than in the existing MTFP.
22. On the assumption that the scheme ceases from 2021/22, with only the remaining legacy payments being made, there is a pressure as the funding falls out, of £1.9m in 2021/22, £0.7m in 2022/23 and £1.1m in 2023/24.

Council Tax Referendum Principles

23. As set out in the Technical Consultation, there will be a 2% Council Tax referendum limit for 2020/21. In addition, an Adult Social Care precept of 2% has been confirmed for 2020/21. Total Council Tax increases can therefore be 3.99% before hitting the referendum level.

Queen's Speech

24. On 19 December 2019 the Queen announced the Government's legislative programme for the upcoming parliamentary session. A Budget is expected in early February 2020 which will set out the financial effect of the reforms. The key areas which have a bearing on the Council are set out below. However, until more details are available, the financial impact of the proposals are not reflected in the proposed budget and MTFP.
 - The Government is providing councils with an additional £1 billion for adults and children's social care in every year of this Parliament and will urgently seeking a cross-party consensus in order to bring forward proposals and legislation for long-term social care reform in England and ensuring that nobody needing care will be forced to sell their home to pay for it.
 - There will be a levelling up of the minimum per-pupil funding for primary schools to £4,000 in 2021/22 and the Government will legally require all local authorities to deliver the minimum per-pupil funding in their local area.
 - The NHS Funding Bill and NHS Long Term Plan will enshrine in law the multi-year funding settlement, agreed in 2019, that will see a £33.9bn increase in cash terms by 2023/24
 - The National Living Wage will increase to reach two-thirds of median earnings within five years (projected to be around £10.50 an hour in 2024), provided economic conditions allow. The Government plans to expand the

¹ Reducing from six years to five in 2017/18 and to four years from 2018/19

reach of the National Living Wage which currently applies to people over the ages of 25, to those aged 21 and over within five years.

- The Government will conduct a fundamental review of business rates. In the meantime, the next business rates revaluation will be brought forward by one year from 2022 to 2021 and business rates revaluations will be moved from a five-yearly cycle to a three-yearly cycle. The retail discount will be increased from one-third to 50 per cent.

Outstanding Information

25. There are several areas where information is still provisional and on which assumptions are included in the budget for 2020/21:
- Final local government finance settlement
 - Local business rates forecasts
 - Confirmed surpluses/shortfalls on council tax and business rates collection funds
 - Several grant notifications including Public Health, Independent Living Fund, Extended Rights to Free Travel and Fire Revenue Grant.
26. Once this information is confirmed it could have an impact on the budget. In light of the information outstanding, it is proposed that authority is delegated to the Leader of the Council, following consultation with the Director of Finance and the Cabinet Member for Finance, to make appropriate changes to the Cabinet's proposed budget ahead of the Council meeting on 11 February 2020. All Councillors will be notified of any updated information once it is received.

Draft Budget 2020/21 & Medium Term Financial Plan to 2023/24 – Funding Position

27. The table below sets out the general funding available for 2020/21 and the net operating budget for 2020/21. The net operating budget represents the gross expenditure on council services less specific government grants (such as the Dedicated Schools Grant).

Funding 2020/21	Current MTFP £m	Proposed Budget £m	Difference to MTFP £m
Settlement Funding Assessment			
Business Rates (Top Up and Local Share)	-64.7	-72.0	-7.3
Business Rates growth	0	-3.1	-3.1
Council Tax			
General Precept	-383.9	-383.9	0.0
Adult Social Care Precept	0	-7.5	-7.5
Collection Fund adjustments	-4.5	-8.3	-3.8
NET OPERATING BUDGET	-453.1	-474.8	-21.7

Settlement Funding Assessment – Business Rates & Revenue Support Grant (RSG)

28. The MTFP assumed negative RSG would be implemented in 2020/21, however the Spending Round and Technical Consultation set out that Government was minded paying off negative RSG again in 2020/21, as it did in 2019/20. This approach would be consistent with the Government's previous commitment, made during the implementation of the business rate retention scheme in 2013/14, that authorities' retained business rates baselines, would be fixed in real terms until the business rates system was reset.
29. As part of the Technical Consultation on the Local Government Finance Settlement for 2020/21, the Government proposed that the Settlement Funding Assessments², will be uprated in line with the change in the small business non-domestic rating multiplier. The small business non-domestic rating multiplier will be confirmed by the time of the provisional settlement.
30. Taking into account an estimate of the small business non-domestic rating multiplier and the removal of negative RSG, extra income of £7.3m is expected for 2020/21 compared to the MTFP.

Business Rates Growth

31. As MHCLG confirmed an uplift in the Settlement Funding Assessments, this also then confirms that there will not be a business rates reset in April 2020 as previously planned. Therefore, growth above the 2013/14 baseline is retained for a further year.
32. The district councils are required to provide final estimates of the council's share of the locally retained element of business rates for 2020/21 including the share of growth by 31 January 2020, together with the council's share of any surplus/deficit estimated from 2019/20. The current estimate of business rate growth for 2020/21 is £3.1m³ in line with the 2019/20 position. No surplus/deficit is assumed at this stage. Should there be a deficit, this will be met from the earmarked Business Rates reserve, held for this purpose.
33. The business rate pool established between Cherwell District Council, West Oxfordshire District Council and the County Council in 2014/15 will continue into 2020/21. The pooling arrangement is expected to bring benefits to the area as a whole through reduced levies on business rates growth. This means that Oxfordshire gets to keep more business rate income than it otherwise would have done. The County Council will receive a 10% share of any growth, in return for taking on a 2.5% share of any loss. As the business rates baseline has not been reset, for 2020/21, the financial benefit for the County Council is expected to be £0.5m and is included in the total growth of £3.1m referred to above.

² comprised of Revenue Support Grant (where authorities still receive any) and Business Rates baseline funding levels (i.e. excluding growth above the baseline)

³ Excluding element of s31 grant for Business Rates compensation

Council Tax Requirement

34. A total council tax increase of 3.99% is proposed in 2020/21 just below the council tax referendum threshold of 4.0%. This comprises a general precept of 1.99% and an Adult Social Care precept of 2.0%. The MTFP assumed a 1.99% increase for 2020/21. The additional 2.0% Adult Social Care precept raises extra council tax income of £7.5m in 2020/21.
35. A council tax increase of 1.99% is proposed for 2021/22 and beyond.
36. The existing MTFP includes a taxbase⁴ of 256,290 for 2020/21, based on assumed growth of 2.00%. The taxbase for 2020/21 has now been confirmed by all district councils at 256,276 an increase of 5,011 or 1.99% from 2019/20. Compared to funding assumed in the MTFP, the variation in taxbase is less than £0.1m lower funding than assumed in the MTFP.
37. Beyond 2020/21, an increase in the taxbase of 5,000 is assumed each year, broadly equivalent to a 1.95% increase.
38. The draft council tax calculation including the council tax requirement for 2020/21 and the Band D council tax equivalent is set out in Appendix 3.

Council Tax Surpluses/Deficits

39. The latest estimate for the council's share of income from collection fund surpluses and shortfalls for 2020/21 is £8.3m, £3.8m higher than the MTFP assumption. Each district council must formally notify the County Council of its share of any surpluses or shortfalls on the council tax collection funds within seven working days of 15 January 2020. The final and confirmed position will be notified in due course.
40. As the lowest surplus from collection fund surpluses has been £5.3m since 2013/14, it is proposed that the budget is increased from £4.5m to £5.0m across the MTFP.

Un-Ringfenced and Ringfenced Specific Grants

41. Ringfenced specific grants are included in Directorate budgets and must be used solely for the purposes of that grant. Un-ringfenced grants are held outside of Directorate budgets in corporate measures contribute towards the cost of services in general. As set out in paragraph 25, some allocations for 2020/21 are yet to be confirmed.
42. Due to the expectation of a full Spending Review in 2019 for 2020/21 and beyond, the existing MTFP assumed the loss of a number of specific grants beyond 2019/20. In line with the one-year Spending Round for 2020/21, the Provisional Local Government Finance Settlement confirmed the continuation of a number of grants that had been assumed to cease, these are referred to in paragraphs 18-22 above.

⁴ The taxbase is the number of banded properties that the council uses to set the council tax. It is the total number of properties in the county weighted by reference to council tax bands A to H and takes into account discounts and exemptions.

The table below sets out the impact of these and other specific grant changes that have been announced. Further details are provided in the following paragraphs.

Year	2020/21	2021/22	2022/23	2023/24	Total All
	£m	£m	£m	£m	£m
Change in Ringfenced Grants					
iBCF (incl Winter Pressures) (paragraph 19)	-10.391				-10.391
Additional BCF funding	-1.000				-1.000
Firefighters pension grant	-1.361	1.361			0.000
Change in Un-ringfenced Specific Grants					
Social Care Grant (paragrpah 20)	-12.031	12.031			0.000
New Homes Bonus (paragrapgh 21)	-1.220	1.893	0.686	1.058	2.417
Additional s31 grant for Business Rates compensation	-1.416	1.416			0.000
Total Changes to Specific Grant Funding	-27.419	16.701	0.686	1.058	-8.974

43. The Local Government Finance Settlement: Technical Consultation confirmed the NHS contribution to adult social care through the Better Care Fund will increase by 3.4% in real terms, in line with the overall NHS long-term settlement. This will mean around an extra £1.0m for the Council. Details of the BCF for 2020/21 are expected to be published early in the new year.
44. The Spending Round confirmed that Home Office has been allocated a budget for 2020/21 which includes the fire pension grant. Funding of £115m is to be provided, which is the same as that in 2019/20. The expectation is that the distribution formula will be updated with the most recent data on employer pension contributions. At this stage an estimated grant of £1.3m expected for 2020/21 but that it will be provided for that year alone.
45. To compensate authorities for the loss of business rates due to mandatory reliefs, such as small business rates relief, MHCLG provide a grant under Section 31 of the Local Government Act 2003. As business rates are not being reset in 2020/21, this grant is being continued and has also been inflated in line with the SFA increase. This provides £1.4m more grant than assumed in the MTFP but is expected to be for one year only due to the expected business rates baseline reset in 2021/22.
46. The Public Health grant is expected to increase at least in line with inflation. On this basis it is estimated that the allocation for the Council could be approximately £30.3m in 2020/21, £0.5m more than 2019/20. However, it is possible that local authorities will be expected to fund new burdens from this increase. As grant details and actual allocations are expected to be announced early in the new year, at this stage no change from 2019/20 is assumed.

Dedicated Schools Grant

47. Dedicated Schools Grant (DSG) allocations for 2020/21 were announced on 19 December 2019. Oxfordshire's provisional allocation for 2020/21 is £510.6m.
48. The Government has reiterated its long-term intention that schools' budgets should be set on the basis of a single, National Funding Formula (NFF). To avoid instability in funding, the approach continues to build in further protection in 2020/21 of:
 - An increase in most formula factors of 4%

- A mandatory minimum per pupil level of funding of £5,000 per secondary pupil and £3,750 per primary pupil
- Removing the cap (ceiling) on any gains so full funding can flow to schools subject to affordability

49. During October/November 2019, schools were again consulted on whether to continue with the implementation, as far as is practicable, of the National Funding Formula in 2020/21. The majority of responses were in favour of a continuation of the NFF in the next financial year 2020/21. Schools Forum subsequently agreed and recommended this continuation of funding methodology.
50. Schools Forum did not support the transfer from the Schools block to High Needs block and given the forecast £7.0m to £8.0m overspend within the High Needs block for 2020/21. The forecast of £7.0m to £8.0m overspend is after the additional funding of £700m nationally announced as part of the Spending Round in September 2019, of which Oxfordshire's share is £8.4m, and the second year of the extra funding announced last year of £1.5m.
51. The Council has appealed the Schools Forum decision with the Secretary of State for Education. A disapplication request was submitted to transfer 0.5% or £2.0m from the Schools Block by the Department for Education deadline of 28 November 2019.

Funding Position beyond 2020/21

52. The current assumption in the proposed MTFP is that, excluding the Improved Better Care Fund and Better Care Fund, specific grant funding announced for 2020/21 does not continue, all of the growth in business rates since 2013/14 is lost and the Settlement Funding assessment increase is removed (i.e. negative Revenue Support Grant is implemented). This funding totals £30.2m and is set out in the table below.

Year	2020/21	2021/22	2022/23	2023/24	Total All
	£m	£m	£m	£m	£m
Settlement Funding Assessment & Business Rates Growth					
Settlement Funding Assessment increase	-7.271	7.271			0.000
Business Rates growth - baseline not reset	-3.119	3.119			0.000
Additional year of MTFP - Inflation on Business Rates				-1.172	-1.172
Council Tax					
ASC precept @2% in 2020/21	-7.528	-0.303	-0.296	-0.303	-8.430
Taxbase impact	0.021	0.198	-0.673		-0.454
Draft Council Tax Surplus	-3.759	3.259			-0.500
Additional year of MTFP - Council Tax				-16.217	-16.217
Total Changes to General Funding	-21.656	13.544	-0.969	-17.692	-26.773
Total Changes to Specific Grant Funding (Paragraph 42)	-27.419	16.701	0.686	1.058	-8.974
TOTAL CHANGES TO FUNDING	-49.075	30.245	-0.283	-16.634	-35.747

53. The Budget which is planned for February 2020 may set out further details of the Government's commitments to funding for local government. Therefore, more

information on funding beyond 2020/21 may become available soon after Council sets the budget and MTFP. In addition, the current MTFP includes a £10.2m additional budgeted contribution to contingency in 2021/22. Depending on the impact of the Budget and as further information becomes available through the Spending Review, work will need to be undertaken during 2020/21 to plan for how a shortfall will be addressed. Updates will be provided to Cabinet as information on the Spending Review and new funding formula become available.

54. In relation to the impact of the Fair Funding Review, whilst it is currently assumed the council's assessed need for social care will increase, the council also has relatively high resources – i.e. the tax base which reduces the reliance on government grant. Therefore, the current working assumption is that the Council will neither benefit or lose under the new formula and a neutral funding position is assumed.

Draft Budget 2020/21 & Medium Term Financial Plan to 2023/24 – Planned Spend

Inflation

55. The existing MTFP assumes pay inflation for Green Book staff at 2.5% for 2020/21. Based on latest information, it is assumed that the pay award will be 2.0%. This gives rise to a saving of £0.8m in 2020/21. Beyond 2020/21, 2.5% is still assumed. An increase of 2.2% is currently assumed for Firefighters. There continues to be no provision for non-pay inflation. Inflation of up to 3% has been applied to contracts based on the relevant price indices for each contract. The total amount of inflation applied to budgets is £5.2m for 2020/21, £0.8m less than the budget of £6.0m.

Investments & Pressures and Income & Savings proposals

56. The budget from 2019/20 has been rolled forward and scrutinised on a line by line basis by Directors and their leadership teams along with Finance Business Partners, and then collectively with CEDR and the Director of Finance to ensure budgets aligns to priorities and future requirements. Details of existing and proposed new investments and identified pressures along with proposed additional income and savings are set out in Appendix 2. As referred to in the main report, pressures and investments along with income and savings have been group into themes within each Directorate reflecting the change in emphasis towards investment that will deliver changes that will secure the sustainability of services in the longer term.
57. The table below sets out that investments and savings (both new and previously agreed) by theme total £40.2m in 2020/21. In total, the new budget changes total £30.5m for 2020/21.

Year	2020/21	2021/22	2022/23	2023/24	Total
	£m	£m	£m	£m	£m
Investment Themes:					
Demographic Pressures	22.967	12.475	12.334	11.650	59.426
Essential Investment	5.834	4.426	-0.067	0.200	10.393
Investment to Manage Demand	9.139	-1.296	0.15	0.25	8.243
Invest to Save	4.776	-4.368	-3.528	-1.652	-4.772
Income Generation	-1.955	-0.510	0.375	0.000	-2.090
Total Net Pressures and Priorities by theme	40.761	10.727	9.264	10.448	71.200
Corporate Measures	-12.356	-12.762	3.530	6.500	-15.088
Total All Net Pressures and Priorities	28.405	-2.035	12.794	16.948	56.112
Of which:					
Budget Changes in existing MTFP	-2.094	0.272	17.803	0.000	15.981
New Budget Changes	30.499	-2.307	-5.009	16.948	40.131

Draft Budget 2020/21 & Medium Term Financial Plan to 2023/24 – Overall Summary

58. The table below sets out a summary of changes from the existing MTFP, after taking into account the changes to funding and proposed new investments, income and savings set out in the report. The table shows a balanced budget for 2020/21 but due to the anticipated funding reductions referred to at paragraph 52, a budget shortfall in 2021/22 of £25.1m. Beyond 2021/22, the current assumption is that the level of government funding will remain stable.
59. Appendix 1 sets out a more detailed view of the proposed MTFP.

Year	2020/21	2021/22	2022/23	2023/24	Total
	£m	£m	£m	£m	£m
Total Changes to Funding	-49.075	30.245	-0.283	-16.634	-35.747
Net New Pressures and Priorities					
Children's Services	14.977	-0.500	-1.155	3.076	16.398
Adult Services	11.729	-0.283	0.936	8.782	21.164
Public Health	-0.175	-0.250	0.425	0.000	0.000
Communities	1.076	0.666	-1.945	-0.750	-0.953
Commercial Development, Assets and Investments	1.415	0.761	-0.902	-0.660	0.614
Customers & Organisational Development	0.906	-0.905	0.300	0.000	0.301
Corporate Measures	0.571	-1.796	-2.668	6.500	2.607
Total Net New Pressures and Priorities	30.499	-2.307	-5.009	16.948	40.131
Shortfall in Existing MTFP	15.581	0.180	1.577	0.000	17.338
Overall position (+budget shortfall / -budget surplus)	-2.995	28.118	-3.715	0.314	21.722
Total Contributions to (+) / Use of Reserves (-)	2.995	-2.995	3.715	-0.314	3.401
Overall position (+budget shortfall / -budget surplus) after contributions to and use of reserves	0.000	25.123	0.000	0.000	25.123

Draft Detailed Revenue Budget 2020/21

60. The report to Council in February 2020 will set out a detailed revenue budget for 2020/21 showing the movement in gross expenditure and income from 2019/20, comprising inflation, specific grant funding changes, previously agreed budget changes and proposed virements.

Virement Rules

61. When approving the budget each year the council is required to agree the virement rules. The existing arrangements have been reviewed and are set out for approval in Appendix 4.

Financial Strategy

62. The Financial Strategy set out in Appendix 5 states that in order to continue to deliver for Oxfordshire residents and thrive in the longer term, financial sustainability and resilience is essential. This requires successful delivery of two critical elements which reflect the financial planning principles for the budget and medium-term plan:
- Managing the impact of rising need, caused by population growth and increased complexity, for adult and children's social care through demand management approaches, more effective pathways and commercial improvements.
 - Delivering the programme of service redesign and organisational development which will drive improved outcomes.
63. The strategy sets out the funding context over the medium and long-term plus financial health performance measures for 2020/21.

Corporate Contingency

64. In forming the proposed budget, there is inevitably some risk that estimates are not entirely accurate and that account should be made for this uncertainty. For this reason, the corporate contingency budget is held to cover;
- the risk that demographic pressures are at the higher end of forecasts, rather than the mid-range forecast assumed in the service budgets;
 - the risk that the time or resources required to deliver invest to save or invest to reduce demand is not sufficient; and
 - the risk that proposed savings are not achieved in full, based on the performance targets set out in the Financial Strategy.
65. The proposed level of corporate contingency for 2020/21 is £4.9m and reflects the following:

	£m
Demographic pressures at higher end of forecasts	3.3
Risks identified within investments/pressures & income/savings	1.6
TOTAL	4.9

66. In addition to the corporate contingency, general balances are held to in order to provide a contingency against unplanned or unexpected events. Further details are set out in the paragraph below.

Earmarked Reserves and General Balances

67. The earmarked reserves and general balances policy statement is set out in Appendix 6.
68. The risk assessment for the level of general balances to be held for 2020/21 has determined that an appropriate level to hold is £23.4m. Based on the Business Management & Monitoring Report to Cabinet in January 2020, the projected level of balances at 31 March 2020 is currently £21.8m. It is proposed that £3.0m is added to general balances in 2020/21. In addition, with the planned annual contribution of £1.0m, means the projected level will be £25.8m at 1 April 2020.
69. Details of earmarked reserves and proposed changes to usage over the medium term are set out in Appendix 7. Excluding schools, earmarked reserves are forecast to be £54.1m at 1 April 2020, reducing to £44.9m by 31 March 2024.
70. One new earmarked reserve is proposed for creation in 2020/21. A new Investment Pump Priming reserve is proposed to meet the initial costs of developing business cases and feasibility studies associated with the strategy. It is expected that this will generally work as a revolving fund, with costs being capitalised if projects proceed. It is proposed that a reserve of £2.0m is created for 2020/21, funded from a contribution of £1.0m from the Insurance Reserve and £1.0m from the Budget Priorities Reserve.

Treasury Management Activity

71. The Treasury Management strategy statement and the annual investment strategy for 2020/21 are set out in Annex 3 of this report. The financial impact of the strategy for 2020/21 is reflected in the budget proposals in this Annex of the Service & Resource Planning report.
72. Proposals to increase the longer-term lending level alongside higher cash balances over the medium term, mean that interest earned is expected to be £0.9m more than in the current MTFP for 2020/21 and a further £0.1m in 2021/22.

Review of Charges

73. As part of the Service & Resource Planning process, managers have reviewed their charges for 2020/21. The expectation was that charges would increase by a minimum of the Bank of England CPI target rate of 2.0%, however the proposed increase should be higher where the market allows or where costs are not being fully recovered (except where legislation dictates a maximum charge).
74. The proposed charges are set out in Appendix 8. Cabinet is recommended to agree these charges in the context of the proposed budget. There are no proposed changes to the review of charges policy from that agreed by Cabinet in January 2019.

Comments from Performance Scrutiny Committee

75. The Performance Scrutiny Committee will consider the revenue investments and pressures plus income and savings proposals at its meeting on 9 January 2020. A summary of the comments will be published following the meeting.

Consultation

76. Between 6 January and 29 January 2020, members of the public and stakeholders have been invited to comment through the council's website on the budget proposals and Council Tax increases. As the consultation extends beyond the date of this meeting, any changes to the proposed budget as a result of comments received will be incorporated into the Service & Resource Planning 2020/21 – 2023/24 report to Council on 11 February 2020.

Equality and Inclusion Implications

77. The Equality Act 2010 imposes a duty on local authorities that, when making decisions of a strategic nature, decision makers must exercise 'due regard to the need to eliminate unlawful discrimination... advance equality of opportunity... and foster good relations.'
78. The potential impacts of the budget proposals will be set out in Service & Community Impact Statements which will be published in due course. The draft overarching Service & Community Impact Statement is attached at Annex 2 – Appendix 9.

LORNA BAXTER
Director of Finance

Medium Term Financial Plan 2020/21 - 2023/24**Summary**

	2020/21			INDICATIVE POSITION								
	Agreed Base Budget	Proposed Allocation	Proposed Budget	2021/22			2022/23			2023/24		
				Proposed Base Budget	Proposed Allocation	Proposed Budget	Proposed Base Budget	Proposed Allocation	Proposed Budget	Proposed Base Budget	Proposed Allocation	Proposed Budget
£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
Directorate Budgets												
Children's Services	113,745	18,312	132,057	132,057	3,727	135,784	135,784	3,345	139,129	139,129	3,076	142,205
Adult Services	184,027	10,322	194,349	194,349	6,268	200,617	200,617	8,086	208,703	208,703	8,782	217,485
Public Health									0			
Communities	94,780	1,953	96,733	96,733	2,197	98,930	98,930	-2,045	96,885	96,885	-750	96,135
Customers & Organisational Development	21,410	-2,149	19,261	19,261	-905	18,356	18,356	50	18,406	18,406		18,406
Commercial Development, Assets and Investment	26,120	4,160	30,280	30,280	801	31,081	31,081	-850	30,231	30,231	-660	29,571
Inflation and Other Adjustments ⁽¹⁾	-1,500	-4,400	-5,900	-5,900	-3,643	-9,543	-9,543	4,085	-5,458	-5,458	6,500	1,042
Directorate Budgets	438,582	28,198	466,780	466,780	8,445	475,225	475,225	12,671	487,896	487,896	16,948	504,844
Strategic Measures												
Capital Financing												
Principal	8,474	576	9,050	9,050	2,233	11,283	11,283	1,635	12,918	12,918		12,918
Interest	15,217	-189	15,028	15,028	90	15,118	15,118	75	15,193	15,193		15,193
Interest on Balances	-8,419	-2,030	-10,449	-10,449	-3,098	-13,547	-13,547	-2,150	-15,697	-15,697		-15,697
Un-Ringfenced Specific Grants	-18,743	-7,952	-26,695	-26,695	15,841	-10,854	-10,854	686	-10,168	-10,168	1,058	-9,110
Contingency	7,629	-2,772	4,857	4,857	10,190	15,047	15,047		15,047	15,047		15,047
Insurance Recharge	2,896	100	2,996	2,996	100	3,096	3,096	100	3,196	3,196		3,196
Public Health Saving	-250	-175	-425	-425		-425	-425	425	0			
Total Strategic Measures	6,804	-12,442	-5,638	-5,638	25,356	19,718	19,718	771	20,489	20,489	1,058	21,547
Contributions to/from reserves												
General Balances	-6,000	9,995	3,995	3,995	-2,995	1,000	1,000		1,000	1,000		1,000
Prudential Borrowing Costs	2,200		2,200	2,200		2,200	2,200		2,200	2,200		2,200
Budget Equalisation Reserve	-280	280						2,754	2,754	2,754	-313	2,441
Budget Prioritisation Reserve	245	4,196	4,441	4,441	-2,618	1,823	1,823		1,823	1,823		1,823
Transformation Reserve	6,000	-6,000							0			
Business Rates Reserve	494	-494							0			
Demographic Risk Reserve	3,000		3,000	3,000		3,000	3,000	1,000	4,000	4,000		4,000
Youth Provision Fund	500	-500							0			
Insurance Reserve	-1,000	1,000							0			
Total Contributions to/from reserves	5,159	8,477	13,636	13,636	-5,613	8,023	8,023	3,754	11,777	11,777	-313	11,464
Budget Shortfall					-25,123	-25,123	-25,123		-25,123	-25,123		-25,123
Net Operating Budget	450,545	24,233	474,778	474,778	3,065	477,843	477,843	17,196	495,039	495,039	17,693	512,732

(1) Adjustment for inflation and other items that have not yet been allocated by Directorate including Transformation Savings.

Medium Term Financial Plan 2020/21 - 2023/24

Financing

	2020/21			INDICATIVE POSITION								
	Proposed Base Budget	Proposed Allocation	Proposed Budget	2021/22			2022/23			2023/24		
	£000	£000	£000	Proposed Base Budget £000	Proposed Allocation £000	Proposed Budget £000	Proposed Base Budget £000	Proposed Allocation £000	Proposed Budget £000	Proposed Base Budget £000	Proposed Allocation £000	Proposed Budget £000
Net Operating Budget	450,545	24,233	474,778	474,778	3,065	477,843	477,843	17,196	495,039	495,039	17,693	512,732
Funded by:												
Government Grant												
Revenue Support Grant		0	0			0			0			0
Business Rates Top-up	-39,896	-589	-40,485	-40,485	5,662	-34,823	-34,823	-610	-35,433	-35,433	-620	-36,053
Total Government Grant	-39,896	-589	-40,485	-40,485	5,662	-34,823	-34,823	-610	-35,433	-35,433	-620	-36,053
Business Rates												
Business Rates local share	-34,015	-574	-34,589	-34,589	3,594	-30,995	-30,995	-542	-31,537	-31,537	-552	-32,089
Collection Fund Surplus/Deficit	-264	264	0	0		0	0	0	0	0	0	0
Total Business Rates	-34,279	-310	-34,589	-34,589	3,594	-30,995	-30,995	-542	-31,537	-31,537	-552	-32,089
Council Tax Surpluses	-7,306	-953	-8,259	-8,259	3,259	-5,000	-5,000		-5,000	-5,000		-5,000
COUNCIL TAX REQUIREMENT	369,064	22,381	391,445	391,445	15,580	407,025	407,025	16,044	423,069	423,069	16,521	439,590
Council Tax Calculation												
Council Tax Base			256,276			261,276			266,276			271,275
Council Tax (Band D equivalent)			£1,527.44			£1,557.84			£1,588.84			£1,620.46
Increase in Council Tax (precept)			6.1%			4.0%			3.9%			3.9%
Increase in Band D Council Tax			3.99%			1.99%			1.99%			1.99%

Summary of Changes to Medium Term Financial Plan

Existing Medium Term Financial Plan

Net Existing Pressures and Priorities	2020/21	2021/22	2022/23	2023/24	Total
	£m	£m	£m	£m	£m
Children's Services	2.474	4.227	4.500	0.000	11.201
Adult Services	9.723	6.551	7.150	0.000	23.424
Public Health	0.000	0.250	0.000	0.000	0.250
Communities	-0.381	0.170	-0.100	0.000	-0.311
Commercial Development, Assets and Investments	0.017	0.040	0.055	0.000	0.112
Customers & Organisational Development	-0.945	0.000	0.000	0.000	-0.945
Corporate Measures	-12.982	-10.966	6.198	0.000	-17.750
Total Net Existing Pressures and Priorities	-2.094	0.272	17.803	0.000	15.981
Existing Funding Changes	17.675	-0.092	-16.226	0.000	1.357
Shortfall in Existing MTFP	15.581	0.180	1.577	0.000	17.338

Changes to Medium Term Financial Plan

Year	2020/21	2021/22	2022/23	2023/24	Total
	£m	£m	£m	£m	£m
Total Changes to Funding	-49.075	30.245	-0.283	-16.634	-35.747
Net New Pressures and Priorities					
Children's Services	14.977	-0.500	-1.155	3.076	16.398
Adult Services	11.729	-0.283	0.936	8.782	21.164
Public Health	-0.175	-0.250	0.425	0.000	0.000
Communities	1.076	0.666	-1.945	-0.750	-0.953
Commercial Development, Assets and Investments	1.415	0.761	-0.902	-0.660	0.614
Customers & Organisational Development	0.906	-0.905	0.300	0.000	0.301
Corporate Measures	0.571	-1.796	-2.668	6.500	2.607
Total Net New Pressures and Priorities	30.499	-2.307	-5.009	16.948	40.131
Shortfall in Existing MTFP	15.581	0.180	1.577	0.000	17.338
Overall position (+budget shortfall / -budget surplus)	-2.995	28.118	-3.715	0.314	21.722
Total Contributions to (+) / Use of Reserves (-)	2.995	-2.995	3.715	-0.314	3.401
Overall position (+budget shortfall / -budget surplus) after contributions to and use of reserves	0.000	25.123	0.000	0.000	25.123

Key

Positive Figures = Investments or Funding of Pressures

Negative Figures - Savings or Income Generation

Year	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Investment Themes:					
Demographic Pressures	21.767	13.675	12.334	11.650	59.426
Essential Investment	5.601	4.001	-0.067	0.200	9.735
Investment to Manage Demand	9.897	-1.521	0.150	0.250	8.776
Invest to Save	4.783	-5.038	-3.028	-1.652	-4.935
Income Generation	-1.232	-0.390	-0.125	0.000	-1.747
Total Net Pressures and Priorities by theme	40.816	10.727	9.264	10.448	71.255
Corporate Measures	-12.411	-12.762	3.530	6.500	-15.143
Total All Net Pressures and Priorities	28.405	-2.035	12.794	16.948	56.112
Of which:					
Budget Changes in existing MTFP	-2.094	0.272	17.803	0.000	15.981
New Budget Changes	30.499	-2.307	-5.009	16.948	40.131
Funded By:					
Funding Changes	-31.400	30.153	-16.509	-16.634	-34.390
Contributions to and Use of Reserves	2.995	-2.995	3.715	-0.314	3.401
TOTAL INVESTMENTS/PRESSURES AND INCOME GENERATION	0.000	25.123	0.000	0.000	25.123

Investments, Pressures and Savings Children's Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
<u>Investment to Manage Demand</u>						
21CS2	SEND - funding for a new early intervention service to address rising demand for High Needs SEND support . This service will provide additional and direct support to schools, ie behavioural support services, to enable them to support children to remain in their current school.	0.409				0.409
21CS9	Children with Disabilities - Direct Payments hourly rate review anticipated impact.	0.040				0.040
21CS12	Transitions Team jointly with adult services to improve outcomes for young people who move in to adult social care. (Also see 21AD20)	0.155	0.155			0.310
19PC1/ 20CH7	Staffing pressure - staffing to meet demographic growth in children's social care services . Numbers of children have increased in children in care teams and extra staffing is required to maintain caseloads at acceptable level .	0.665	0.292	0.300		1.257
21CS17	Leaving care - new duties on councils to support care leavers to age of 25 (previously 21) requires service redesign to meet current and future demand of eligible young people .	0.337				0.337
<u>Invest to Save</u>						
21CS4	Access to Education - Independent Travel Trainer - post required to support young people to learn the skills to travel alone . This will reduce demand on home to school transport and maximise independence for young people where appropriate .	0.037				0.037

Investments, Pressures and Savings

Children's Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21CS21	Family safeguarding model - this is the introduction of a new model in children social care . This will provide support to the whole family and is a preventative model which has proven in other areas to both enhance outcomes for children and their families and manage demand. The costs detailed below include costs of implementing the model as well as increased staffing to deliver it.	2.228	-1.208	-1.431	-0.944	-1.355
20CH4	Family safeguarding model - Programme investment	0.080				0.080
21CS26	Fostering project - this is a new project to support a new offer to foster carers in Oxfordshire . The costs cover increased fees and support to in-house foster carers. This will encourage more people to join the scheme which will increase the number of children who are supported in this way. The savings attached to this project (over the following years) are based on an increased percentage of children in care being supported in this way as opposed to independent fostering or private residential care.	0.600	-0.401	-0.393	-0.230	-0.424
Demographic Pressures						
21CS3	SEND - Educational psychologists to meet anticipated growth in demand . The number of children requiring Educational Health Care plans (EHCPs) continues to grow - 33% in 2019 . Extra resources are needed to assess and support these children and meet statutory guidelines .	0.348				0.348
21CS1	SEND - Casework Team additional numbers of staff needed to meet rise in numbers of children on EHCPs.	0.860	0.194			1.054
19PC1/20C H3	Access to Education - Home to School Transport Demography to meet demand, particularly in relation to SEND transport.	1.215	1.215	0.800		3.230
21CS6	Access to Education - Home to School Transport Demography to meet demand, particularly in relation to SEND transport.	2.985	0.085	0.500	1.300	4.870

Investments, Pressures and Savings

Children's Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
19PC1/20C H6	Children with Disabilities: Demographic Increases - extra resources required to meet increased numbers of children with disabilities supported by our children social care.	0.200	0.200	0.200		0.600
21CS8	Children with Disabilities - Demographic Increases - extra resources required to meet increased numbers of children with disabilities supported by our children social care.				0.200	0.200
21CS10	Children with Disabilities - Social Work Teams pressure to meet current increased demand.	0.190				0.190
21CS11	Children with Disabilities - Specialist Housing Occupational Therapist additional temporary resource to address current waiting lists. Extra resources are required to meet increased numbers of children with disabilities supported by our children social care.	0.170	-0.085	-0.085		0.000
21CS13	Children's Social Care Specialist Advice and Legal Costs	0.200				0.200
19PC1/20C H5	Corporate parenting placements - this pressure is linked to both the anticipated demand for placements for children in care . Includes rising costs of many of our specialist placements .	4.203	3.520	3.800		11.523
21CS14	Corporate parenting placements - this pressure is linked to both the anticipated demand for placements for children in care . Includes rising costs of many of our specialist placements .	1.400			2.600	4.000
21CS16	Social care staffing team pressures to meet current and anticipated demand. Extra resources required in social care teams to maintain caseloads	0.386	-0.140	-0.246		0.000
20CH8	Leaving Care Allowances and Support	0.150	0.150	0.150		0.450
21CS20	Leaving Care Allowances and Support				0.150	0.150

Investments, Pressures and Savings Children's Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Essential Investment						
19PC4/ 20CH9/ 20CH10	Home to School Transport Saving	-0.270	-0.400			-0.670
21CS5	Original savings plans reversed due to ongoing pressure in this area. Further work will look at ways to better manage demand rather than achieve savings	0.270	0.400			0.670
21CS7	Learning and school improvement - post to provide permanent current enhanced support to provide support to safeguarding in schools	0.050				0.050
20CH14	Reconnecting Families - supporting some children in care to return to birth families	-0.833				-0.833
20CH15/ 20CH21	Review of third party spend - commissioning to review contracts , collaboration with providers etc to provide appropriate placements and support to children and provide best value	-1.000	-0.250	-0.250		-1.500
21CS15	Reduce savings to be made through review of third party spend	0.250				0.250
21CS35	Reduce savings to be made through review of third party spend - Not achieved in 2019/20	1.650				1.650
20CH18	Supported lodgings - increasing the supported lodging scheme to offer to more young people	-0.120				-0.120
21CS18	Increased safeguarding support and advice for schools	0.047				0.047
21CS19	Funding to support the Care Leavers Council Tax Discount Scheme across Oxfordshire	0.021				0.021
20CH16	Fostering - previously agreed saving	-1.016				-1.016
21CS29	Reverse previously agreed fostering savings - savings will be achieved following completion of new project (see 21CS26)	1.016				1.016

Investments, Pressures and Savings Children's Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21CS30	Reverse fostering savings from 2019/20 - savings will be achieved following completion of new project (see 21CS26)	0.088				0.088
20CH17/ 20CH23	Savings arising from Service Redesign	-0.800	-0.500	-0.500		-1.800
21CS32	Reverse Service Redesign savings - savings to be achieved from implementing Family Safeguarding Model (See 21CS21)	0.800	0.500	0.500	0.000	1.800
21CS33	Reverse part of Service Redesign savings from 2019/20 - savings to be achieved from implementing Family Safeguarding Model (See 21CS24)	0.440				0.440
Total Investments, Pressures and Savings		17.451	3.727	3.345	3.076	27.599
Total New Investments, Pressures and Savings		14.977	-0.500	-1.155	3.076	16.398

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Summary by theme

Investment to manage demand	1.606	0.447	0.300	0.000	2.353
Invest to save	2.945	-1.609	-1.824	-1.174	-1.662
Demographic pressures	12.307	5.139	5.119	4.250	26.815
Essential Investment	0.593	-0.250	-0.250	0.000	0.093
	17.451	3.727	3.345	3.076	27.599

Investments, Pressures and Savings

Public Health

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Investment to Manage Demand						
21PH4	School Vision Screening - Oxford University NHS Trust funding will cease at the end of 2019/20. Public Health will fund the service from 2020/21 onwards.	0.110				0.110
21PH5	Adult Substance Misuse - one of the outcomes of the Family Safeguarding Model pilot project is an increase in activity needed to support adults with substance misuse issues.	0.072				0.072
Demographic Pressures						
21PH1	Drugs and Alcohol residential detoxification and/or rehabilitation placement activity is higher than the budgeted level in 2019/20 and this is expected to continue from 2020/21	0.200				0.200
21PH6	Weight management services - existing capacity will be doubled through revised contract arrangements and will support an additional 1% of the local population unmet need	0.210	0.210			0.420
Essential Investment						
21PH16	Use the Public Health reserve to manage pressures and savings within the ringfenced grant funding	-0.137	0.144	-0.037	-0.033	-0.063
21PH3	Estimated Public Health funded staff salary inflation (to be met from Public Health grant funding)	0.045	0.046	0.047	0.048	0.186
21PH8	Jubilee House - review and halve hot desk provision for council staff when current arrangements end in November 2022. Retain 8 desks.			-0.010	-0.015	-0.025
21PH9	Sexual Health - align budget with current and expected on-going activity level due to cost effective changes to the contract	-0.500				-0.500

Investments, Pressures and Savings

Public Health

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21PH11	Sexual Health - move to on-line testing offer for sexually transmitted diseases		-0.200			-0.200
21PH14	Smoking Cessation Service (non - statutory currently) - contract break point in March 2021. Current contract value is £0.575m per annum. Remodel and reprocure current provision.		-0.200			-0.200
19PPH1	Contribution from reserves towards Public Health activity funded by the Council for three years (2018/19 to 2020/21)		0.250			0.250
21PH15	Use of Public Health Reserve to support the costs of the system wise posts as part of the Family Safeguarding model in Children's Services. Total contribution of £0.425m in 2020/21 and 2021/22. (See 21CS21)	-0.175	-0.250	0.425		0.000
Total Investments, Pressures and Savings		-0.175	0.000	0.425	0.000	0.250

Total New Investments, Pressures and Savings	-0.175	-0.250	0.425	0.000	0.000
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Summary by theme

Investment to manage demand	0.182	0.000	0.000	0.000	0.182
Invest to save	0.000	0.000	0.000	0.000	0.000
Demographic Pressures	0.410	0.210	0.000	0.000	0.620
Income generation	0.000	0.000	0.000	0.000	0.000
Essential Investment	-0.767	-0.210	0.425	0.000	-0.802
	-0.175	0.000	0.425	0.000	0.000

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Investment to Manage Demand						
21AD1	Community Capacity: Strengthen and build community capacity, informal care networks & connections in Oxfordshire to help people to live as independent lives as possible.	0.250	0.250	0.250	0.250	1.000
21AD28	Community Capacity: a reduction in care home placements generated by better support in the community (1% = approx 7-8 placements costing £0.3m per annum @ £800 per week average). Assumes reduction from Q4 of 2020/21 onwards. (links to 21AD1)	-0.075	-0.225			-0.300
21AD2	Care Workforce: initiatives that continue to develop best practice and shared ways of addressing workforce issues and encouraging people to want to work across the local health and social care system.	0.125				0.125
21AD3	Innovation: Develop new ways of working and drive a reduction in the need for formal care, and service improvements through an on-going series of innovation projects.	0.250				0.250
21AD4	Equipment: Additional funding for equipment required to support people to remain independent in their own homes for as long as possible. Assumes 2019/20 activity levels continue from 2020/21.	0.250				0.250
21AD5	Winter: Support for one - off change and project activity to mitigate pressures on the local health and social care system in winter 2020/21.	1.200	-1.200			0.000
20AD8	Housing Related Support: the council will invest £0.250m into the Oxfordshire Homelessness Partnership in each of 2020/21 and 2021/22.	0.250		-0.250		0.000
21AD23	Housing Related Support: support for people with housing issues to enable them to leave hospital.	0.200				0.200

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21AD24	Housing Related Support: An additional council contribution to Floyds Row Homelessness Hub in Oxford (funded collectively by statutory authorities in Oxfordshire) to support ongoing development of the service.	0.088	-0.088			0.000
20MC8	Grant Change Impact: The Winter Pressures element of the iBCF grant was used to fund growth in social care expenditure (demography) on a one-off basis in 2019/20. This needs to be replaced by base budget funding in 2020/21	2.292				2.292
19PA3	Grant Change Impact: On - going funding for the Hospital Team. The cost of the team was funded by iBCF grant in 2017/18, 2018/19 and 2019/20.	1.200				1.200
19PA3	Grant Change Impact: On - going funding for the on-going cost of inflationary increases paid to care providers in 2017/18. This was funded by iBCF grant in 2017/18, 2018/19 and 2019/20.	1.700				1.700
21AD30	Service Review: The Community Outreach & Floating Support Service provides support for vulnerable adults and people with learning disabilities. The service is being reviewed and this will generate a commercial saving.	-0.056				-0.056
Invest to Save						
20AD11	Service Review: Work to coordinate purchasing of support for people with Learning Disabilities on a regional basis, generating a Regional Framework leading to a commercial saving	-0.200				-0.200
21AD10	Care Workforce: Increase funding for Shared Lives carers to maintain payment rates compared to neighbouring areas. Also includes the on-going impact of benefit changes impacting on contributions to housing costs for people living with Shared Lives carers.	0.217	0.088	0.120	0.032	0.457

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21AD11	Mental Health & Autism: Funding for transformation projects designed to improve flow through the housing pathway for people with mental health issues and/or autism and reduce expenditure on residential placements on an on-going basis.	1.000	-1.000			0.000
21AD12	Mental Health & Autism: One - off contribution to the cost of residential placements for people with mental health issues and/or autism	1.750	-1.750			0.000
20AD12	Individual Reviews: reviews of older people receiving support at home to ensure they have the right level of support.	-1.200				-1.200
20AD6	Co-Production: Co-Production and cross system work (reduction partially removed in 20AD6U)	-0.312				-0.312
20AD6U	Co-Production: the team was originally funded to the end of 2019/20. Based on outcomes the 3 FTE team + non - pay costs will continue to be funded on an on-going basis. (links to 20AD6)	0.237				0.237
Demographic Pressures						
19PA1 & 20AD3	Population Changes for Adults with Learning Disabilities: Funding for Demographic Changes built into existing MTFP based on increasing current spend by growth indices developed by Emerson & Hatton for the incidence of learning disability in the general population.	2.100	2.342	2.436		6.878
21AD6	Population Changes for Adults with Learning Disabilities: impact of Demographic Changes - add additional year to MTFP based on growth indices for the incidence of learning disability in the general population.				2.520	2.520
20AD1	Population Changes: Actual learning disability growth is higher than existing MTFP demography assumptions (assuming £1.5m per annum net package growth)	0.500	0.500	0.500		1.500

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21AD7	Population Changes: Learning Disability expenditure is higher than existing MTFP assumptions and planned demographic growth based on forecast position for 2019/20. Additional pressure assumes on-going effect of 2019/20 activity then £2.0m per annum net package growth from 2020/21 onwards (based on average growth over last two years).	1.200	0.700	0.600	1.100	3.600
21AD8	Population Changes: expenditure on the social care element of educational placements for young adults aged 18 - 25 increased in 2018/19 and was overspent by £1.0m. An overspend of £1.3m against the 2019/20 budget is expected to be on-going from 2020/21 as the placements will continue over the medium term.	1.600	0.300	0.300	0.300	2.500
21AD13	Population Changes: On-going effect of additional 2019/20 activity relating to adults with autism.	0.375				0.375
21AD14	Population Changes: On-going effect of additional 2019/20 activity relating to adults with other conditions including mental health, substance misuse and complex vulnerability.	0.375				0.375
21AD15	Population Changes: On-going effect of additional 2019/20 activity and expenditure relating to adults with physical disabilities.	0.750				0.750
19PA1 & 20AD3	Population Changes for Older People: impact of Demographic Changes built into existing MTFP - additional packages of care required for growing and ageing population. Based on uplifting existing budgets by Office for National Statistics population estimates.	2.900	3.234	3.364		9.498
21AD16	Population Changes for Older People: impact of Demographic Changes - add additional year to MTFP based on population growth and changes to the age profile.				3.480	3.480

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21AD20	Staffing: additional adult social work capacity to support young people moving from Children's to Adult Social Care.	0.050	0.050			0.100
21AD26	Care Workforce: support at home activity continues at lower than budgeted level in 2020/21 ahead of a review of homecare.	-0.600	0.600			0.000
21AD27	Care Workforce: completed re-ablement packages continue to be below contracted level in 2020/21	-0.600	0.600			0.000
Essential Investment						
20AD10U	Service Review: £1.2m of Learning Disability saving 20AD10 (in 2019/20) is not expected to be achieved as planned in 2019/20. A further £0.5m of the existing saving is expected to be achieved through reviews of placements in 2020/21. The remaining £0.7m is not expected to be achievable based on current activity. (links to 20AD10)	0.700				0.700
21AD9	Service Review: Health & Safety related mitigations for night time fire risk for vulnerable adults in supported living accommodation.	0.300				0.300
19PA5	Individual Reviews: reviews of people in out of county Learning Disability placements with the aim of providing in county support. (Transforming Care)	-0.457	-0.325			-0.782
19PA5U	Individual Reviews: Remove Learning Disabilities Transforming Care saving. Local housing provision needs to be developed before this can be progressed. (links to 19PA5)	0.729	0.325			1.054
20AD19	Staffing: Reduction to Mental Health Social Work contribution	-0.300	-0.300			-0.600
20AD19U	Staffing: Remove reduction to Mental Health staffing contribution and review options for the use of this funding for people with mental health issues and/or autism which include the possibility of staffing provision either in or outside Oxford Health Foundation Trust. (links to 20AD19)	0.300	0.300			0.600

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21AD17	Service Review: The council's new contractual arrangements for homecare will be implemented in April 2021. After taking account of one - off implementation costs in 2020/21 the additional on-going cost of the new arrangements underpins a move towards working in closer partnership with local home support providers to maintain capacity and develop improved outcomes for the system. Pressure reflects implementation costs and change to paying for planned hours for home support to aid financial planning and stability for providers. Significant benefits are expected through moving away from a transactional relationship with providers.	0.300	1.100			1.400
20AD17U	Service Review: Reprofile part of saving 20AD17 to reflect updated timescale for the implementation of commercial changes relating to the way the council commissions care home placements. Phasing reflects turnover of placements and ability to move to block contracting arrangements as existing spot placements come to an end. (links to 20AD17)	0.667	-0.333	-0.334		0.000
20AD4	Inflation: uplifts to Care Packages (links to increased cost for providers driven by increases to the National Living Wage and other costs) .	0.900	1.100	1.100		3.100
21AD31	Inflation: Additional funding required to support increases to the National Living Wage - linked to Homecare 2020	0.400				0.400
21AD18	Inflation: additional year of funding for provider inflationary uplifts to MTFP.				1.100	1.100
21AD19	Staffing: Money Management (£0.013m) & Brokerage capacity for Extra Care Housing (£0.040m) plus historic health funding for weekend working falls out (£0.116m).	0.169				0.169

Investments, Pressures and Savings

Adult Services

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21AD21	Staffing: self Funder Support (offset by self - funder income) - two additional Care & Brokerage staff to support people funding their own care to find appropriate care provision.	0.070				0.070
21AD29	Income: self - funder charges contribute to costs of self - funder offer. (links to 21AD21)	-0.070				-0.070
21AD22	System: County Council share of health and social care system management costs	0.075				0.075
19PA7	Income: Income Impairment (remove one - off reduction to the impairment of outstanding service user contributions towards their care included in 2019/20 budget)	0.350				0.350
21AD25	Service Review: adjustments to reflect current activity and previously achieved commercial savings	-0.497				-0.497
Total Investments, Pressures and Savings		21.452	6.268	8.086	8.782	44.588
Total New Investments, Pressures and Savings		11.729	-0.283	0.936	8.782	21.164
Memorandum - Additional Ring-Fenced Adult Social Care Funding						
	iBCF Ringfenced Grant Funding (including £2.292m for winter	-10.391				-10.391
	Increase in contribution from the Better Care Fund	-1.000				-1.000
	Adult Social Care Precept (2.0% in 2020/21)	-7.528	-0.303	-0.296	-0.303	-8.430
Total Additional Funding for Adult Social Care		-18.919	-0.303	-0.296	-0.303	-19.821

Summary by theme

Investment to manage demand	7.674	-1.263	0.000	0.250	6.661
Invest to save	1.492	-2.662	0.120	0.032	-1.018
Demographic Pressures	8.650	8.326	7.200	7.400	31.576
Essential Investment	3.636	1.867	0.766	1.100	7.369
	21.452	6.268	8.086	8.782	44.588

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Investment to Manage Demand						
19COM16	Housing and Growth Deal Capacity Funding. <i>(ending of temp funding)</i>	-2.000				-2.000
19COM17	Housing and Growth Deal Capacity Funding. <i>(ending of temp funding)</i>	2.000				2.000
21COM11	Improvement in natural environment responses/advice to planning applications and consultations e.g. ecology, biodiversity, natural environment.	0.060	0.040			0.100
21COM20	Enhancing the provision of safety related tree maintenance - a 2-year programme of works to ensure the safety of trees adjacent to our highways on on our OCC property for which the County has responsibility.	0.200	0.200	-0.150		0.250
Invest to Save						
21COM3	One off cost to invest in the improvement of data management and processes to enable timely council-wide responses to planning consultations.	0.200	0.200	-0.400		0.000
21COM13	One-off drawdown from S106 penalty monies (offset 21COM03)	-0.200	-0.200	0.400		0.000
21COM4	Improvement to the data management and processes that enable the Council to provide council-wide responses to planning consultations.	0.093				0.093
21COM14	Draw down from S106 penalty monies (offset 21COM04)	-0.093				-0.093

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COM6	Active and Healthy Travel: supporting the development of county wide walking and cycling provision . This is investment into additional capacity to develop more detailed plans to push forward improved provision for pedestrians and cyclists across the county, further developing the walking and cycling plans for Bicester, Oxford and Didcot, enabling the council to provide better legacy after the OVO races and support the modal shift we need to encourage to reduce carbon. On average 40% of an individuals carbon footprint is the way they travel so this also links to the Climate Action declaration.	0.102	0.054			0.156
21COM7	Climate Action mobilisation and investment aligned with the Council's Climate Declaration. The implementation of a joint team with CDC to develop and promote climate action across the Council - including the monitoring of air quality and supporting directorates to deliver carbon reduction activities.	0.337	0.112			0.449
21COM8	Digitalisation of development management and enforcement service to enable more efficient, flexible working.		0.150		-0.300	-0.150
19COM1	Update of the Oxfordshire Strategic Transport Model. <i>(ending of temp funding)</i>		-0.500			-0.500
21COM9	Development and implementation of a new service delivery model for Travel Planning team, to enable the service to become self financing and provide a better service to customers.	0.250	-0.150	-0.250		-0.150
21COM25	Music Teachers' Pay and pension contributions - annual rises	0.120				0.120

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COM27	Music Service - Increased charges to reflect music teacher cost increase (offset 21COM25)	-0.120				-0.120
20COM1	Street Lighting - Energy and Maintenance Costs	0.100	0.150	0.150		0.400
18EE10/ 19COM4/ 19COM14/2 0COM12	Savings from reduced energy and maintenance costs relating to Street Lighting (assumes capital investment)	-1.120	-0.950	-0.930		-3.000
20COM2	Street Lighting - Borrowing Costs of replacement investment			0.780		0.780
21COM26	LED replacement programme. Previous stretch targets for the implementation of LED street-lighting have not been achieved by third party contractors. Acceleration proposed to bring this back on track but likely to cause delay in energy & maintenance savings. Re-profile of 20COM12.	0.400	0.350	-0.750		0.000
Demographic Pressures						
20COM10	Increase share of Joint Control Centre costs - growth in volume (Fire & Rescue Service)			0.015		0.015
Income Generation						
21COM12	New charge for natural environment advice on planning consultations/applications (21COM11)	-0.010	-0.010	-0.010		-0.030
19COM6	Increased Income Target (realised through pre-planning process based on 5yr planned growth projections)	-0.250	-0.250			-0.500

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
20COM19	Income from the new Strategic Transport Model.	-0.060	-0.080	-0.100		-0.240
21COM16	New charge for pre-application advise on air quality.	-0.009				-0.009
21COM17	Increased Development Management fees for minerals and waste applications	-0.025				-0.025
21COM18	Increased income through Road Agreements	-0.250				-0.250
21COM19	Increased income through Planning Performance Agreements and pre-application advise to developers.	-0.100				-0.100
21COM28	Cost recovery of comingled DIY waste at recycling centres	-0.100				-0.100
21COM35	Gross income from Permit Scheme is expected to be £1m pa. The direct costs to operate scheme are £800k, therefore contributing £200k to organisational overheads.	-0.200				-0.200
20COM21	Cost recovery charges for services provided to Coroner's Service			-0.005		-0.005
20COM23	Increased income from extra demand (Fire & Rescue Service)			-0.010		-0.010
21COM42	Charging for deployment of fire and rescue emergency resources to incidents in other counties as per the agreement ratified by the Joint Fire and Rescue Thames Valley Joint Committee	-0.040				-0.040
21COM43	Local Resilience Forum contributions reduction. Review of the contribution from District and City Councils following an increase in costs	-0.008				-0.008

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COM44	Grant funding contribution to illegal tobacco work	-0.010				-0.010
Essential Investment						
21COM1	Strategic Rail Cotswold Taskforce: partnership contribution to progress to progress the significant enhancement of the rail corridor supporting growth in West Oxfordshire.	0.175	-0.090	-0.085		0.000
21COM2	Development of the flood risk data base: statutory requirement to hold information on flood assets across the county (by March 2021)	0.090	-0.090			0.000
21COM45	New programme of vegetation clearing, cleaning and other minor activities, delivered by 1 gang in the north and 1 gang in the south of the county, the programme to be developed in conjunction with the local members in line with the collaborative programme objectives from the capital programme.	0.320				0.320
21COM31	Capitalisation of current revenue funded minor works gangs (4 no.)	-0.640				-0.640
18EE4	Phase 2 of Minerals & Waste Plan (ending of temp funding).	-0.200				-0.200
21COM5	Additional staffing costs required to recoup S38 income. Costs covered through income secured (21COM15)	0.065				0.065
21COM15	Full income realised through recouping S38 income (offsets 21COM5)	-0.150	-0.050			-0.200
18EE3	Household Waste Recycling Centre (HWRC) Prudential Borrowing costs - future investment (ending of temp funding).	-0.018				-0.018

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COM21	Coroners Service - increased costs for the contracted provision of collection and transport for the coroners service.	0.117				0.117
21COM22	OCC contributions towards real time passenger informations system, shelter maintenance, and pole maintenance to ensure the promotion of bus services as an alternative mode of transport.	0.100				0.100
20COM14	Integrated Transport Unit (ITU) change to the cost of operating model.	-0.500	-0.600			-1.100
21COM23	ITU - Planned operating cost savings delayed resulting in an in-year pressures due to wider consideration with joint SEN project. Re-profile of 20COM14.	0.200	0.200	-0.400		0.000
20COM26	Income - Additional parking income.	-0.300				-0.300
21COM24	Re-assessment of the costs and the income targets from previous years impacting on the short-term sustainability of continued draw down at a level of £1.9m from the parking account.	0.750		-0.300	-0.450	0.000
20COM13	ITU - Use of Bus Services Operators Grant to fund net cost of the Comet Bus Service (end of temporary funding)		0.400			0.400
20COM15	Community Operations - short term use of Waste demography until 2021/22		0.500			0.500
20COM27	Release of Highways Maintenance budget (end of temporary funding)		1.500			1.500
21COM29	Reducing costs of managing Household Waste Recycling Centre sites	-0.100	-0.100			-0.200

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COM30	Funding of relevant traffic signal expenditure from the capital programme leading to reduced funding from the revenue budget.	-0.250				-0.250
21COM32	Following upgrading of the highways depot facilities as part of the capital programme providing a reduction in the cost on regular maintenance of highway depots.		-0.100			-0.100
21COM33	Following from the implementation of the transformation of corporate services there is an ability to remove a Project Officer post in Community Operations.	-0.063				-0.063
21COM34	Community operations has reviewed the core revenue budget for its service improvement activities and has identified that they can be funded from capital grants recharging for officer time as well as capitalising some relevant work.	-0.050	-0.050			-0.100
21COM36	Restructure will result in fewer management posts (Cultural Services)	-0.150				-0.150
19FRS5	Reinstate contribution to vehicle replacement reserve (was funded from capital temporarily)	0.800				0.800
20COM9	Increased pension costs for Fire Fighters	1.167				1.167
21COM37	Recalculation of firefighter pensions, leading to increased contribution from employers - original estimate has been revised.		0.200			0.200
21COM39	Contract for use of external facilities to provide realistic fire training to operational crews to development and maintain competence (Fire & Rescue Service).	0.100				0.100

Investments, Pressures and Savings Communities

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COM40	Legal requirement in Oct 2020 for Fire Investigation to comply with ISO standard. Delivering in a collaborative approach with key partners reduces costs from £0.150m to £0.04m.	0.040				0.040
20COM20	Impact of greater alignment of services (Fire & Rescue Service)		-0.150			-0.150
20COM22	Retained Fire Fighters budget higher than required		0.150			0.150
21COM41	Wholetime Shift Review project - following engagement with staff starting trials in January 2020, expected to deliver savings beyond the £0.9m delivered in 19/20 (Fire & Rescue Service)	-0.075				-0.075
Total Investments, Pressures and Savings		0.695	0.836	-2.045	-0.750	-1.264
Total New Investments, Pressures and Savings		1.076	0.666	-1.945	-0.750	-0.953

Summary by theme

Investment to manage demand	0.260	0.240	-0.150	0.000	0.350
Invest to save	0.069	-0.784	-1.000	-0.300	-2.015
Demographic Pressures	0.000	0.000	0.015	0.000	0.015
Income generation	-1.212	-0.390	-0.125	0.000	-1.727
Essential Investment	1.578	1.770	-0.785	-0.450	2.113
	0.695	0.836	-2.045	-0.750	-1.264

Investments, Pressures and Savings

Customers and Organisational Development

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Investment to Manage Demand						
19RES18	Councillor Priorities Fund (£15,000 per Councillor) <i>(ending of temp funding)</i>	-0.945				-0.945
21COD01	Councillor Priority Fund - new funding proposed	0.945	-0.945			0.000
21COD09	Funding required to manage demand and response to frontline customer service queries in the contact centre. As the county council continues to improve and develop its frontline customer service offer more calls will be handled in the contact centre (for example highways, blue badges, adult social care), staffing must be maintained to ensure effective and efficient response.	0.175				0.175
Essential Investment						
21COD08	New Occupational Health service (centralised)	0.060				0.060
21COD02	Joint Performance and Risk System with CDC - on-going maintenance costs		0.040			0.040
21COD07	Microsoft Licensing increase costs from 2022			0.300		0.300

Investments, Pressures and Savings Customers and Organisational Development

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21COD05	Cease legacy contracts for ICT supplies and services	-0.247				-0.247
21COD06	Cease legacy contracts for supplies and services	-0.027				-0.027
Total Investments, Pressures and Savings		-0.039	-0.905	0.300	0.000	-0.644

Total New Investment, Pressures and Savings		0.906	-0.905	0.300	0.000	0.301
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Summary by theme

Investment to manage demand	0.175	-0.945	0.000	0.000	-0.770
Invest to save	0.000	0.000	0.000	0.000	0.000
Demographic Pressures	0.000	0.000	0.000	0.000	0.000
Income generation	0.000	0.000	0.000	0.000	0.000
Essential Investment	-0.214	0.040	0.300	0.000	0.126
	-0.039	-0.905	0.300	0.000	-0.644

Investments, Pressures and Savings

Commercial Development, Assets and Investments

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
Invest to Save						
21CDAI13	Climate Action - a key part of the reduction in carbon relates to our property portfolio, this will fund specialist staff and staff training to enhance the internal skills and abilities of the property and estates team to make them self-sufficient by 22/23 and meet the climate action motion.	0.180	0.060	-0.180	-0.060	0.000
21CDAI17	Salix / potential borrowing relating to energy savings and repayments coming to and end	-0.053	-0.043	-0.044		-0.140
21CDAI9	Review of Catering Services - enhancing the service to enable it to develop a more commercially enhanced operating model with the introduction of a commercial manager and teams to provide a service to external organisations e.g. school academies / other authorities.	0.150		-0.100	-0.150	-0.100
Demographic Pressures						
21CDAI21	Legal Services - cost pressure for ongoing levels of demand across directorates	0.400				0.400
Income Generation						
21CDAI22	Impact of increased Legal Services hourly rate for Section 106 and other charges (in Review of Charges)	-0.020				-0.020
Essential Investment						
21CDAI1	The continued development of the Corporate Facilities Management team to provide coverage across the full property portfolio to ensure all services are maintained effectively for all OCC properties.	0.200				0.200

Investments, Pressures and Savings

Commercial Development, Assets and Investments

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21CDAI2	Enhancement of the property security service within Facilities Management providing security services across all of OCC property portfolio, currently limited to a small number of sites.	0.100	0.200			0.300
21CDAI3	Construction function - with the increase in the schools programme (capital programme) there is a need to enhance the team to be fit to deliver the service (90% of these costs capitalisable)	0.070				0.070
21CDAI4	Review of project related workload and current delivery model - to review the structure and management of the property and estates team in line with the communities redesign work.	-0.200				-0.200
21CDAI5	Review of Hard Facilities Management Services - following the review of the OCC assets we have identified the need for the replacement of hard systems e.g. heating systems etc. this is profiled to manage the replacement over the MTFP.		0.200	-0.100	-0.100	0.000
21CDAI6	Holistic review of all posts/activities within Property, Investment & Facilities Management revenue vs capital charging purposes	-0.250				-0.250
21CDAI7	Consolidation of various activities between the three separate functions, reducing duplication and increasing efficiency	-0.025				-0.025
21CDAI8	Further to the implementation of the provision cycle work we will carry out a holistic review of our whole supply chain and existing contractual arrangements, including opportunities to renegotiate various existing arrangements.		-0.150			-0.150
20COM7	Atrium (Property database) replacement costs (ending of temp funding)	-0.050	-0.025	-0.015		-0.090
18CM2	Impact of 2017 Rates Revaluation.	0.019				0.019
21CDAI10	Rates Revaluation			0.019		0.019

Investments, Pressures and Savings

Commercial Development, Assets and Investments

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
20COM6	Property utility cost increases	0.035	0.065	0.070		0.170
21CDAI11	Cost of utility costs rising	0.035	0.065	0.070	-0.150	0.020
21CDAI12	Costs to bring our Assets to a satisfactory operating level	0.300	0.700	-0.500	-0.200	0.300
20COM18	Joint Use Agreements - One off funding to part fund pressure	0.100				0.100
21CDAI14	Joint Use Agreements - the current agreements with district for the use of leisure centres by schools require a level of maintenance to be undertaken over the next 3 years	0.338	-0.271	-0.067		0.000
21CDAI15	Health & Safety / Compliance works - continued works to maintain the	0.200				0.200
21CDAI16	Health & Safety / Compliance team - consolidation, collaboration and future proofing to ensure we maintain the level of statutory compliance	0.050				0.050
21CDAI18	A40 toilets closure - running costs to stop	-0.070				-0.070

Investments, Pressures and Savings

Commercial Development, Assets and Investments

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21CDAI19	Improved efficiency through fully implementing e-bundling across the legal service	0.010				0.010
19RES12	IBC on-boarding charge ends	-0.087				-0.087
Total Investments, Pressures and Savings		1.432	0.801	-0.847	-0.660	0.726

Total New Investments, Pressures and Savings		1.415	0.761	-0.902	-0.660	0.614
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Summary by theme

Investment to manage demand	0.000	0.000	0.000	0.000	0.000
Invest to save	0.277	0.017	-0.324	-0.210	-0.240
Demographic Pressures	0.400	0.000	0.000	0.000	0.400
Income generation	-0.020	0.000	0.000	0.000	-0.020
Essential Investment	0.775	0.784	-0.523	-0.450	0.586
	1.432	0.801	-0.847	-0.660	0.726

Investments, Pressures and Savings

Corporate Measures

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
BALANCE	Balance Available to allocate		7.876			7.876
20CM3	Inflation for 2022/23 (additional year of MTFP)			6.600		6.600
VARIOUS	Additional income from Treasury Management activity	-0.761	-0.621	-0.440		-1.822
19CM4	Reduction in inflation allocation	-1.500				-1.500
20CM14a	Revised profile of Service Redesign programme savings	-7.500	-9.500			-17.000
20CM13	Contribution to Contingency (end of temporary addition)	-3.242				-3.242
20CM24	Youth Provision Fund (end of temporary funding)	-1.000				-1.000
VARIOUS	Contributions to/ Use of Reserves agreed in previous years	7.076	-1.618	0.038		5.496
19RES19	End of temporary funding for WW1 celebration in 2019/20	-0.055				-0.055
21CM13	Inflation provision in 2023/24				6.500	6.500
21CM17	Impact of reprofiling of Service Redesign programme	2.811	-0.143	-2.668		0.000
21CM19	Reduce Funding held for pay inflation by 0.5%, pay award assumed to be 2.0%	-0.758				-0.758
21CM21	Additional income from Treasury Management activity due to higher cash balances	-0.882	-0.153			-1.035
21CM25	Additional ongoing contribution to Contingency	0.494				0.494

Investments, Pressures and Savings

Corporate Measures

Ref	Existing (shaded) and New Pressures/Investments and Income/Savings	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21CM20	Amend previously agreed contributions to earmarked reserves as set out in Appendix 6	-1.094	-1.500			-2.594
21CM23	Budget Equalisation Reserve Contribution (one-off)			3.715	-0.314	3.401
21CM22	Contribution to general balances	2.995	-2.995			0.000
Total Investments, Pressures and Savings		-9.416	-15.757	7.245	6.186	-11.742
Total New Investments, Pressures and Savings		0.571	-1.796	-2.668	6.500	2.607
Total Contributions to (+) / Use of Reserves (-)		2.995	-2.995	3.715	-0.314	3.401

Funding Changes

Ref	Existing (shaded) and New Funding Changes	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
VARIOUS	Previously Agreed Changes to Business Rate Income	5.254	0.053	-1.151		4.156
19CM3	Impact of changes in previous years to taxbase	-1.430	0.149	-7.112		-8.393
19CM16 20CM10	Impact of Additional Council Tax in previous years	-0.282	-0.294	-7.963		-8.539
20CM7	Negative Revenue Support Grant - not implemented in 2019/20 (falls out in 2020/21)	6.239				6.239
20CM8	Unringfenced Social Care Grant - announced in Autumn Budget 2018 (falls out in 2020/21)	3.914				3.914
20CM18	Levy Account Surplus - New Grant (falls out in 2020/21)	1.086				1.086
20CM21	Increased Collection Fund Surplus (falls out in 2020/21)	2.806				2.806
20CM22	Brexit Preparation Grant (falls out in 2020/21)	0.088				0.088
21CM14	Council Tax increase 1.99% in 2023/24				-8.250	-8.250
21CM16	Inflation increase on Business rates in 2023/24				-1.172	-1.172
21CM2	Business Rates - no negative RSG to reduce top-up, no reset and inflation on 19/20 figure	-10.390	10.390			0.000
21CM1	Additional 2% Council Tax - Adult Social Care Precept	-7.528	-0.303	-0.296	-0.303	-8.430
21CM10	Tax Base growth only 1.99% rather than 2.00%	0.021	0.003	0.001		0.025
21CM12	Taxbase forecast increase at 5,000 per year (previously increased by a percentage)		0.195	-0.674	-7.967	-8.446
21CM11	Council tax surpluses	-3.759	3.259			-0.500
21CM4	No fallout of iBCF & Winter Pressures Grant - assumed to be ongoing	-10.391				-10.391
21CM9	Additional BCF funding - assumed to be ongoing	-1.000				-1.000
21CM7	Fire Pension Grant continues in 2020/21	-1.361	1.361			0.000
21CM5	Social Care Support Grant continues in 2020/21	-3.915	3.915			0.000
21CM6	New Social Care Grant for 2020/21	-8.116	8.116			0.000

Funding Changes

Ref	Existing (shaded) and New Funding Changes	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m	Total £m
21CM8	New Homes Bonus - scheme payment continues in 2020/21 then ceases	-1.220	1.893	0.686	1.058	2.417
21CM3	No fallout of S31 grant for business rates	-1.416	1.416			0.000
Total Funding Changes		-31.400	30.153	-16.509	-16.634	-34.390
Total New Funding Changes		-49.075	30.245	-0.283	-16.634	-35.747

Draft Council Tax and Precepts 2020/21

Council Tax Data

1. In order to set its budget for 2020/21, the council needs to calculate its council tax requirement. This is the amount that the council needs to raise from council tax to meet its expenditure after taking account of the income it will accrue from the following
 - (a) the amount to be received from specific grants.
 - (b) the amount to be received from Revenue Support Grant and the Business Rates Top Up under the Business Rates Retention Scheme.
 - (c) the amount to be received for the County Council's share of Non-Domestic Rating Income.
 - (d) any surpluses/shortfalls on the Council Tax Collection Funds and Business Rates Collection Funds for earlier years and the estimated position for the current year.
 - (e) the amount expected to be received from fees, charges and contributions.
2. In order to set its council tax for the forthcoming year, the council needs to calculate its council tax requirement and have available the council tax base, expressed in terms of Band D equivalent properties.
3. Based on the final information on funding and assuming a council tax requirement of **£391,445,480** as shown in the proposed Medium Term Financial Plan (Annex 2 - Appendix 1) the calculation of the Band D Council Tax for 2020/21 is as follows:

Council Tax Calculation 2020/21

	£m
County Council net expenditure after specific grants	474.778
Less: Revenue Support Grant	0.000
Business Rates Top Up	-40.485
Non-Domestic Rating Income	-34.589
Council Tax Collection Fund Adjustments	-8.259
Business Rates Collection Fund Adjustments	0.000
Council Tax Requirement (R)	391.445
Council Tax Base (assuming losses on collection) (T)	256,275.52
Band D Council Tax (R/T)	£1,527.44

The calculation of the council tax for the other bands is shown below in Table 1. Table 2 analyses the tax base over each district council area and allocates the estimated County Council precept to each area relative to their tax base.

Table 1**Council Tax by Property Band for Oxfordshire County Council**

Assuming a Band D council tax of £1,527.44, the council tax for other bands is as follows:

Property Band	Property Values	Band D Proportion	2019/20 £ p
A	Up to £40,000	6/9	1,018.29
B	Over £40,000 and up to £52,000	7/9	1,188.01
C	Over £52,000 and up to £68,000	8/9	1,357.72
D	Over £68,000 and up to £88,000	9/9	1,527.44
E	Over £88,000 and up to £120,000	11/9	1,866.87
F	Over £120,000 and up to £160,000	13/9	2,206.30
G	Over £160,000 and up to £320,000	15/9	2,545.73
H	Over £320,000	18/9	3,054.88

Table 2**Allocation of Precept to Districts**

The County Council precept (£391,445,480) is the sum of the council tax income required to fund the Council's budget.

District Council	Tax Base Number	Assumed Precept Due £ p
Cherwell	55,559.90	84,864,413.66
Oxford City	45,895.50	70,102,622.52
South Oxfordshire	57,848.50	88,360,112.84
Vale of White Horse	52,686.40	80,475,314.82
West Oxfordshire	44,285.22	67,643,016.44
TOTAL	256,275.52	391,445,480.28

Formal approval is required under the council tax legislation for:

- The County Council's precept, allocated to district councils pro rata to their share of the council tax base for the County Council;
- The council tax figures for the County Council for a Band D equivalent property and a calculation of the equivalent council tax figure for all other bands.

The information must be given to district councils by 1 March 2020.

Virement Rules 2020/21

Introduction

1. The Council's budget is the financial expression of its plans and policies. The virement process allows budgets to be adjusted to reflect changes in those plans and policies throughout the financial year. The use of virements is intended to enable directorates to manage budgets with a degree of flexibility while at the same time ensuring that these remain consistent with the overall policy framework determined by Council.
2. Under the Constitution the Council is required to specify the extent of virement within the approved budget which may be undertaken by the Cabinet or delegated to officers. Any other changes to the budget are reserved to the Council, other than any changes necessary to ensure compliance with the law, ministerial direction or government guidance.
3. Virements for these purposes is taken to include:
 - the transfer of budget provision between budget heads as set out in budget approved by Council each February prior to the start of the financial year;
 - changes to gross income and gross expenditure budgets;
 - changes arising from additional non-ringfenced grant income notified in year;
 - transfers between revenue and capital budgets;
 - the transfer of funds from general balances or contingency by way of supplementary estimate.
4. Virements can be temporary virements, only affecting the current financial year, or permanent, affecting the current financial year and all future years.
5. No expenditure shall be incurred without appropriate budget provision and, if necessary, a virement should be undertaken to put this in place before the expenditure is incurred.
6. No virement relating to a specific financial year should be made after 31 March of that financial year.
7. Where Cabinet approval is required for a virement, this approval will normally be sought via the monthly ' Business Management and Monitoring Report'. The report must explain the reason for the virement, the proposed expenditure and the source of funding, and set out the implications in the current and future financial years.

Cumulative Rule

8. If a proposed virement, together with the total of previous virements within the same financial year, would result in a cumulative increase or decrease that would require approval at a higher level (for example Council rather than Cabinet), the cumulative virement should be reported and approval obtained for

the virement that triggers the requirement for cumulative approval, in accordance with the table below. The overall effect on the relevant budget must be noted as part of the request. Once the higher level of approval has been obtained for a cumulative virement the total is reset to zero. This means that any subsequent virement is treated as a new and separate request. Cumulative virements are reset to zero at the end of each financial year.

Virement Approvals

9. All virements will be subject to the following approval limits:

Amount	Minimum approval required
Up to and including £0.5m <i>(Subject to the cumulative rule above)</i>	Director <i>(following consultation with the Budget Holder), Section 151 Officer</i> and relevant Cabinet Member(s)
Greater than £0.5m <i>(Subject to the cumulative rule above)</i>	Cabinet <i>(following consultation with relevant Cabinet Member(s), Director and Section 151 Officer)</i>
Major Change in Policy and is worth £0.5m or more but less than £1m	Cabinet <i>(following consultation with relevant Cabinet Member(s), Director and Section 151 Officer)</i> Officer and relevant Cabinet member(s)). Section 151 Officer must consider if virements involve a major change in policy)
Any virement that involves a major change in policy and is over £1m	Council (Section 151 Officer must consider if virements involve a major change in policy)

Exceptions to the virement rules

10. Exceptions to the virement rules are as follows:
- (i) If **Section 151 Officer** decides a decision by Council or Cabinet is required.
 - (ii) Member approval is not required where a budget will continue to be used for the approved purpose but is being moved, for example, to reflect a change in budget holder responsibilities. Such transfers will however require the approval of the relevant Finance Business Partner(s).
 - (iii) Ringfenced grant funding has to be used for specified purpose. Virements to update income and expenditure budgets to match the grant notification provided by the relevant body can be actioned without further approval.
 - (iv) Transfers between revenue and capital will be classed as a change in policy and will require Council approval regardless of the value.

Financial Strategy 2020/21

Overview

The Financial Strategy supports the delivery of all other council strategies, such as the Corporate Plan and the Capital & Investment Strategy. It links the council's more detailed service plans, asset management plans and capital plans with the longer term to show that the council's plans are financially achievable.

This budget is underpinned by a financial strategy to ensure the financial sustainability of the Council, deliver essential services to residents and achieve our vision for **thriving communities for everyone in Oxfordshire**, within a limited amount of resource. This will continue to be achieved by focusing on continuous improvement and increasing income generation.

In order to continue to deliver for our residents and thrive in the longer term, financial sustainability and resilience is essential. This requires successful delivery of two critical elements which reflect the financial planning principles for the budget and medium-term plan:

- Managing the impact of rising need, caused by population growth and increased complexity, for adult and children's social care through demand management approaches, more effective pathways and commercial improvements.
- Delivering the programme of service redesign and organisational development which will drive improved outcomes.

Over the last six years, we have generated savings to taxpayers of £260m. The Council has a good track record in delivering savings and delivering value to our residents, with a constant focus on our strategic outcomes and financial prudence.

Funding Context

When the 2019/20 to 2022/23 MTFP was set in February 2019 there was a high degree of uncertainty about funding beyond 2020/21. As set out in the Financial Strategy for 2019/20¹, a spending review was expected in 2019 combined with a new funding formula, following the Fair Funding review, and the introduction of 75% Business Rate Retention.

This spending review has now been delayed until 2021/22. The technical consultation on the settlement for 2020/21, released in October 2019, proposed a roll forward of funding from 2019/20. The Changes to funding assumptions for 2020/21 arising from the detail provided in the technical consultation were set out in Service and Resource Planning update to Cabinet².

The 50% Business Rates retention scheme was introduced in 2013/14 with a planned reset of the baseline due in 2020/21. Growth across Oxfordshire has been consistent

¹ Link to Section 4.6 Financial Strategy to [Council February 2019](#)

² Link to Cabinet report – [September](#)

since 2013/14 and by 2020/21 Oxfordshire County Council will be receiving approximately £3.1m³ annually. It is now expected that the reset will not take place for 2020/21 but will be delayed until 2021/22 to align with the Fair Funding Review.

The technical consultation confirmed the continuation of the improved Better Care Fund and Adult Social Care Grant. It also included a further 2% adult social care precept for 2020/21. In recognition of national concerns about social care funding levels and the impact of these on NHS pressures a further un-ringfenced grant for social care was included in the consultation, totalling £1 billion nationally.

The general election, held on 12 December 2019, created a delay in the announcement of the provisional settlement which was originally expected on 5 December 2019. This was announced on 20 December 2019. There were no significant differences from the technical consultation. However, this may mean that the government will also miss the target date of 31 January 2020 to publish the final settlement.

Medium Term

We recognise the challenges we face and there will be a continued focus on service redesign, commercialism, effective contract management and working with partners to secure value for money in delivering our Corporate Plan priorities.

The impact of the Fair Funding Review is unknown. This makes it very difficult to predict the level of funding available for 2021/22 and beyond. A budget is expected to be brought forward by the new Government in February 2020. This budget may provide an indication of funding beyond 2020/21 but the prospect of a new budget creates further uncertainty in the short term.

The proposed MTFP has a budgeted shortfall of £25.1m in 2021/22. Within this shortfall, it is assumed that the business rate baseline is reset (£4.5m), social care support grants end (£12.0m), the Settlement Funding Assessment is reduced (£7.3m), the Fire Fighters pension grant ends (£1.4m), New Homes Bonus scheme winds down (£1.9m).

The current MTFP includes a £10.2m additional budgeted contribution to contingency in 2021/22. This contribution provides some cover should the Fair Funding Review adversely impact on the Council's funding beyond the assumptions already made.

Although the impact of the Fair Funding Review is unclear, beyond 2021/22 the current working assumption is that the level of government support will remain stable as the review should deliver a clear and sustainable funding model.

Tax base growth is expected to be 4,977 Band D equivalent properties or 1.98% for 2020/21 and an increase in taxbase of 5,000 approximately 2.00% beyond. After taking into account an allowance for inflation and the current levels of demographic

³ Excluding element of s31 grant for Business Rates compensation

growth, the tax base increase required to give a breakeven position is around 1.75%. Given the ambition to plan for and support the delivery of 100,000 homes by 2031 as part of the Housing & Growth Deal secured in February 2018, this increase is expected to be surpassed in the medium term. This is equivalent to around 15,000 new houses over the medium term to 2024.

As set out in the Earmarked Reserves and General Balances Policy Statement (Appendix 6) it is expected that the Dedicated Schools Grant (DSG) High Needs Reserve will be in deficit at the end of 2019/20 and the medium term. This is a common position for upper tier local authorities and there is uncertainty about how this projected deficit should be accounted for. The current CIPFA guidance⁴ does not allow for useable reserves to be presented in a deficit provision which means that the deficit would need to be met from general balances. In contrast, the Department for Education issued a consultation in Autumn 2019 which proposed to amend the conditions of grant and regulations applying to the DSG to clarify that the DSG is a ring-fenced specific grant separate from the general funding of local authorities. Under this proposal, any deficit an authority may have on its DSG account would be carried forward and should not be covered by the authority's general reserves. The position taken by external auditors is in line with CIPFA guidance, that an authority cannot have a negative reserve and not planning to meet the shortfall from general balances or earmarked reserves could result in an adverse assessment of the authority's financial position. In order to help mitigate this risk, a demographic risk reserve has been created which will reach £17m over the MTFP. This reserve, combined with a planned higher level of general balances (as set out in Annex 2 – Appendix 6), means that it is possible to offset the expected deficit over the medium term.

Long Term

In planning for the long term, it is important to understand both the context of Oxfordshire as well as the main drivers of change. In this context, we need to ensure that the most fundamental issues facing the organisation which have been identified are responded to. Longer term planning needs to account for alternative possible future economic and political environments.

The Capital & Investment Strategy sets out the long-term context in which capital expenditure and investment decisions are made and gives due consideration to both risk and reward and impact on the achievement of priority outcomes. This strategy effectively becomes the long-term plan.

The capital programme is a ten-year programme which offers strategic choice and options around developing our community assets and respond to the fundamental issues of rising demand in adults and children's services and allow for a for planned approach to replacement of assets.

The Council has already taken advantage of this longer-term approach. In July 2018, Cabinet approved investment Street Lighting LED replacement programme of £41m replacing traditional lanterns with LED. And as an invest to save scheme, the costs

⁴ [CIPFA LAAP Bulletin 99 'Local Authority Reserves and Balances'](#)

will be repaid from the savings in the energy costs that will be generated from the programme. In September 2018, Cabinet approved investment of £120m in the Council's assets to be funded by borrowing. Reduced funding and deterioration in asset condition in highways and property led to reassessment of the benefits of investment. Investment at this stage will allow repairs to many of the roads already in poor condition and reduce the number of potholes that arise and improve the longevity of future repairs in these areas, thus reducing the increasing pressure on revenue resources.

Measuring financial performance

Measuring the Council's financial health through a set of targeted measures is a key way of measuring our financial health and resilience in supporting the Council's plans and priorities. The key indicators upon which we will measure ourselves are set out in Annex 1 below.

The CIPFA Financial Resilience Index was published on 16 December. The index is a comparative analytical tool based on publicly available information. It is intended to support good financial management by providing an assessment of relative financial health, giving reassurance to councils that are relatively stable or prompting challenge where councils are outliers.

The index offers insight into the comparative level of earmarked and general balances held by local authorities. The level of reserves as a percentage of net revenue budget and the rate at which reserves are being depleted are both identified as indicators of financial stress. The Earmarked Reserves and General Balances Policy Statement (Appendix 6) considers the potential stress factors identified by index.

Financial Management

Financial indicators alone do not give a complete picture of financial health and sustainability; strengths of financial management and governance are also an essential foundation of any successful organisation.

CIPFA have recognised this and in November 2019 launched the first Code of Practice for Financial Management (the FM Code). The FM code is not statutory but compliance with the code is obligatory. It brings together elements that are already part of existing statutory guidance:

- Role of the Chief Financial Officer in Local Government
- Prudential Code for Capital Finance
- Code of Practice on Local Authority Accounting in the United Kingdom

The FM Code clarifies how Chief Finance Officers should satisfy their statutory responsibility for good financial administration as required in section 151 of the Local Government Act 1972. Importantly it emphasises the collective financial responsibility of the leadership team, including the relevant elected members, of which the Chief Finance Officer is one member.

The FM Code has six key themes:

- Organisational **leadership** – demonstrating a clear strategic direction based on a vision in which financial management is embedded into organisational culture.
- **Accountability** – based on medium-term financial planning that drives the annual budget process supported by effective risk management, quality supporting data and whole life costs.
- Financial management is undertaken with **transparency** at its core using consistent, meaningful and understandable data, reported frequently with evidence of periodic officer action and elected member decision making.
- Adherence to professional **standards** is promoted by the leadership team and is evidenced.
- Sources of **assurance** are recognised as an effective tool mainstreamed into financial management, including political scrutiny and the results of external audit, internal audit and inspection.
- The long-term **sustainability** of local services is at the heart of all financial management processes and is evidenced by prudent use of public resources.

The FM Code includes 19 standards which the Council must measure itself against to demonstrate compliance with the six key themes. An early assessment indicates that the Council is well placed for full compliance by April 2021. Where possible, compliance with standards will be achieved by 2020/21.

Indicator	2020/21 Target	Within MTFP period	
Delivering to budget & Achieving Savings:			
Directorates deliver services and achieve planned performance within agreed budget	=<1% budget variation (with service outcomes achieved and planned activity delivered)	=<1% budget variation (with service outcomes achieved and planned activity delivered)	
Total outturn variation	0%	0%	
Achievement of planned savings	95% of all savings in year	n/a	
Progress towards achieving savings in 2021/22	90% of all future savings are on track to be achieved	n/a	
Systems and processes operate effectively and are well controlled to reduce and detect error and fraud:			
Positive assurance from Internal Audit and External Audit			
Late payments	>95%	>95%	
Use of Grants / Earmarked Reserves			
Total outturn variation for DSG grant funded services	Schools and early years to break even. Use of high needs DSG to match Action Plan	Schools and early years to break even. Use of high needs DSG to match Action Plan	
Use of non – DSG revenue grant funding	>=95% of grant funding is spent in year.		
Ability to manage unplanned/unforeseen events			
General balance outturn at the risk assessed level	=>the risk assessed level	=>the risk assessed level	
Forecast outturn of cost of insurance claims received in year	=< the actuarial assessment	=< the actuarial assessment	
Capital Programme Delivery			
Average cost variation from Concept Design (Gate 1) baseline to Practical Completion (Gate 3)	<=2%	<=1%	
Value of committed capital expenditure funded by s106 not yet received	<=5% of total programme	<=2.5% of total programme	
Debt Management			
Invoice Collection Rate	Corporate debtors	97.50%	98%
	ASC contribution debtors	92%	94%

Indicator	2020/21 Target		Within MTFP period
Debtor Days	Corporate debtors	35 days	30 days
	ASC contribution debtors	100 days	65 days
Debt requiring impairment	Corporate debtors	<£0.300m	<£0.250m
	ASC contribution debtors	<£2m	<£1m
Write offs as a percentage of invoiced income	Corporate debtors	<0.10%	<0.05%
	ASC contribution debtors	<1%	<0.60%
Unsecure debt over 1 year	Corporate debtors	<£0.5m	<£0.250
	ASC contribution debtors	<£1.6m	<£1m
Treasury Management			
Average interest rate achieved in-house compared to treasury Management Budgeted Rate	>=0.85%		2021/22 >=0.75% 2022/23 >=0.75% 2023/24 >=0.75%
Average Annualised Return achieved compared to Benchmark Rate* (Pooled Fund)	>=3.75%		>=3.75%

(*) composite of 7 Day LIBID, 7 Day LIBID + 50BPS, IPD Other Balanced Property Funds Index, BofA Merrill Lynch 1-10 Year Non-Gilt Index & BofA Merrill Lynch Euro High Yield ex Financials Index (GBP Hedged)

Earmarked Reserves and General Balances Policy Statement 2020/21

Introduction

1. This paper sets out the Council's policies underpinning the maintenance of a level of general balances and earmarked reserves within the Council's accounts.

Statutory Position

2. A local authority is not permitted to allow its spending to exceed its available resources so that overall it would be in deficit. Sections 32 and 43 of the Local Government Finance Act 1992 require authorities to have regard to the level of balances and reserves needed for meeting future estimated future expenditure when calculating the council tax requirement.
3. Balances and reserves can be held for three main purposes:
 - A working balance to help cushion the impact of uneven cash flows and avoid unnecessary temporary borrowing, this forms part of general reserves
 - A contingency to cushion the impact of unexpected events or emergencies, this forms part of general balances;
 - A means of building up funds often referred to as earmarked reserves, to meet known or predicted liabilities
4. This policy statement is concerned with general balances and earmarked reserves as defined above.

Purpose of balances and reserves

5. The Council maintains general balances in order to provide a contingency against unplanned or unexpected events.
6. Although there is no recognised official guidance on the level of general balances to be maintained, the key factor is that the level should be justifiable in the context of local circumstances. The council's external auditor comments on the level of balances and reserves as part of the annual audit of the Council's financial position. Financial regulations require Council to decide on the level of general balances it wishes to maintain before it can decide the level of council tax. This will be done as part of the annual budget setting process.
7. Whilst general balances are unallocated, earmarked reserves are held for a specific purpose and to mitigate against potential future known or predicted liabilities.

Planned use of balances and reserves

8. Planned use of earmarked reserves or general balances in setting a budget each year is an acceptable approach subject to the level of reserves being adequate and necessary, albeit recognising that it is only a one-off measure. Any planned use of, or contribution to, earmarked reserves or balances must be included as part of the budget setting process each year.
9. In accordance with the Council's Financial Procedure Rules, any new reserves or a change in the purpose of earmarked reserves requires Cabinet approval.

Level of General Balances

10. In recent years, it has been considered prudent to maintain a level of balances commensurate with risk, with a risk assessment undertaken annually by the Section 151 officer (Director of Finance), as part of the budget setting process. CIPFA's Financial Resilience Index provides information on the level of general balances for all authorities. Excluding extremes, the average percentage of net revenue budget held for general balances in County Councils is 5.1%.
11. The risk assessment for 2020/21 has determined that balances should be held at £23.4m, compared to £19.3m for 2019/20. This is equivalent to 4.9% of the proposed net revenue budget for 2020/21. Based on the latest 2019/20 Business Management & Monitoring Report to Cabinet in January 2020, the expected level of balances at 31 March 2020 is currently £21.8m assuming the forecast directorate overspend is met from contingency.
12. The increase in the assessed risk from 2019/20 is primarily as a result of separately identifying the risk that known pressures will exceed the level of additional funding agreed and using the average percentage held for County Councils as a guide. Details of the risk assessment are set out at the end of this Appendix.
13. The proposed budget includes a contribution to balances of £3.0m in 2020/21. In addition, the existing MTFP includes an annual £1.0m contribution to balances to replenish any use from the previous year and ensure that the risk assessed level is maintained. Based on the current forecast level of balances at 31/3/2020, these contributions take the expected level to £25.8m at 1/4/2020.

Earmarked Reserves

14. Annex 2 – Appendix 7 sets out the actual level of earmarked reserves at 31 March 2019 and expected level at 31 March each year to 2024. It also sets out the purpose of each of the earmarked reserves. Details of new reserves and issues of significance are set out in the paragraphs below.
15. Excluding schools, earmarked reserves are forecast to be £54.1m at 1 April 2020, reducing over the medium term to £44.9m by 2023/24. This position takes into account an estimated deficit on the DSG High Needs Block Reserve by

2023/24 of £33.6m. Excluding schools, the forecast level of earmarked reserves at 31 March 2019 was £54.8m this time last year, with the actual position being £75.0m. In addition, forecast earmarked reserves, excluding schools, by the end of the MTFP period have increased from £35.3m per last years' Service & Resource Planning round to £44.9m this year.

Existing Earmarked Reserves

16. In 2017/18, as part of this policy document, Cabinet approved the amalgamation of a large number of low value reserves into a single Budget Priorities reserve. This decision was made on the basis that holding a large number of small reserves was restrictive in using them holistically in accordance with the Financial Strategy. The existing MTFP includes the repayment, into this reserve of £8.1m used earlier years in 2020/21, 2021/22 and 2022/23, with a further addition of £1.8m proposed in 2023/24. The reserve is not currently earmarked for specific purposes, as budget priorities are addressed through the revenue budget proposals. After taking account of the transfer to the new Redundancy Reserve in 2019/20 (see Paragraph 17), the balance in this reserve is currently expected to be £10.7m by 2023/24. It is proposed that £3.0m is used to fund towards the redundancy Reserve; and £1.0m towards the Investment Pump Priming Reserve.
17. A new Redundancy Reserve of £1.0m has been created during 2019/20 to meet the costs associated with service redesign. It is proposed that a further £3.0m is added to the reserve over the period 2020/21 and 2021/22 to meet further predicted costs. This will be achieved through a contribution from the Budget Priorities Reserve.
18. Based on the current profile of spend, the balance if funding remaining in the Transformation Reserve at the end of 2019/20 is £2.7m. The remaining sum will be used to meet the costs of further service redesign and organisational development.
19. It is expected that the Dedicated Schools Grant (DSG) High Needs Reserve will be in deficit at the end of 2019/20 and the medium term. The Department for Education (DfE) has recently consulted on changing the conditions of grant and regulations applying to the DSG, to clarify that it is ring-fenced specific grant separate from the general funding of local authorities. It also clarifies that any deficit an authority may have on its DSG account is expected to be carried forward and should not be covered by the authority's general reserves. The Government will make a decision on the proposed changes, in time to inform the setting of local authorities' budget for the financial year 2020/21. Based on current levels of demand, it is anticipated that the reserve could reach a deficit of £33.6m by 2023/24.
20. In light of the significant pressures relating to High Needs and other budgets with demographic volatility, last year the budget included £3.0m of on-going funding in 2019/20 (and rising in future years) to help manage demographic risk. The funding is intended to be held in the reserve until its need is determined. It is proposed that annual contributions are kept at £3.0m per year for 2020/21 and 2021/22, releasing ongoing funding of £0.6m in 2020/21, a further £1.0m in

2021/22. An additional annual contribution to the reserve of £1.0m remains for 2022/23. Therefore, the total in the reserve by 2023/24 is expected to be £17.0m.

21. The Insurance Reserve is held for insurance claims that are likely to be received. The level of the reserve is determined based on an annual actuarial assessment. As the expected balance at 31 March 2020 is greater than the actuarial assessment, it is proposed that £1.0m is taken from the reserve and is used to help create the Investment Pump Priming reserve.
22. The Public Health Grant Reserve, which holds the balance of unspent grant and must be spent on public health related activity, is expected to have a balance of £1.2m at 31 March 2020. It is proposed that a contribution of £0.4m for both 2020/21 and 2021/22 is made to support the costs of up to ten system wide posts as part of the Family Safeguarding Model in Children's Services.
23. In 2015/16 a new reserve was created with an annual contribution of £0.5m to manage the impact of future year business Rates collection fund deficits. This reserve has not been used since 2016/17 and the balance of the reserve is £1.0m at the end of 2019/20. It is proposed that the annual contribution is stopped and the £0.5m instead added to the contingency budget.

New Earmarked Reserves

24. Following the adoption by Council of the Investment Strategy in September 2019, and updated approval as part of the Service & Resource Planning process each year, a new Investment Pump Priming reserve is proposed to be created to meet the initial costs of developing business cases and feasibility studies associated with the strategy. It is expected that this will generally work as a revolving fund, with costs being capitalised if projects proceed. It is proposed that a reserve of £2.0m is created for 2020/21, to be funded evenly from contributions from the Insurance Reserve and the Budget Priorities Reserve.

Financial Resilience Index

25. CIPFA's Financial Resilience Index is designed to support and improve discussions surrounding local authority financial resilience. It shows a council's performance against a range of measures associated with financial risk, including the level of earmarked reserves and general balances. The Index is a comparative tool to be used to support good financial management and generate a common understanding of the financial position within authorities.
26. For 2018/19, the Index shows that Oxfordshire had relatively high depletion of reserves compared to other County Councils, and that reserves were relatively lower than many other counties. However, for 2017/18 and earlier years, Oxfordshire compared more averagely to other counties. This position reflects the financial planning principles for 2018/19, which set out that a holistic approach would be taken in using reserves in 2018/19 to allow time for the actions to reduce demand start to take effect. £14.7m of earmarked reserves were used towards setting a balanced budget for 2018/19. £1.0m of earmarked reserves were used towards setting a balanced budget in 2019/20. No earmarked

reserves are proposed to be used to balance the budget in 2020/21. In addition, as set out above, the risk assessed level of General Balances has been increased to £23.4m, including an additional contribution as per the proposed 2020/21 Budget. This will increase the overall level of reserves,

2020/21 risk assessment for determining appropriate level of balances

	2020/2 1		2019/2 0
Area of risk	£m	Explanation of risk/justification of balances	£m
Emergencies	1.0	Expenditure below Bellwin Scheme threshold (0.2% of annual net operating budget).	0.9
Directorate overspends	3.9	Risk that directorates will overspend due to unforeseen pressures, demography or demand (based on a 2.0% adverse variance).	3.1
Non-achievement of planned savings	7.6	Risk that savings are not achieved. This is based on a risk assessment of savings which considers the deliverability of the savings proposals.	6.7
Pressures identified within Medium Term Financial Plan exceed budgeted amounts	2.1	Risk that pressures will exceed the level of additional funding agreed. The allowance is made based on an assessment of the volatility of pressures and the level of certainty about the level of funding required to meet the pressure.	0.0
Contingent liabilities & insurance risk	4.0	Possible liabilities for which no provision has been made or funding set aside in an earmarked reserve (0.5% of gross expenditure or minimum to meet quantified contingent liabilities)	3.9
Major contracts & 3rd party spend	4.8	Risk of contractors failing, mis-specification, or non-delivery plus contract costs increase by more than allowed for in the budget (1.5% of estimated annual value of 3rd party spend)	4.7
Total	23.4		19.3

Forecast Earmarked Reserves 2019/20 to 2023/24

	2019/20			2020/21		2021/22		2022/23		2023/24	
	Balance at 1 April £000	Movement £000	Forecast Balance at £000	Movement £000	Forecast Balance at £000	Movement £000	Forecast Balance at £000	Movement £000	Forecast Balance at £000	Movement £000	Forecast Balance at £000
Schools' Reserves	17,309	-4,751	12,558	-6,585	5,973	-3,175	2,798	-1,609	1,189	-422	767
Vehicle and Equipment Reserve	2,901	-2,124	777	-389	388	-198	190	-190	0	0	0
Grants and Contributions Reserve *	14,704	-19,319	-4,615	-8,564	-13,179	-6,425	-19,604	-6,200	-25,804	-5,072	-30,876
Government Initiatives	1,324	-451	873	-814	59	-59	0	0	0	0	0
Trading Accounts	325	138	463	-203	260	-130	130	-129	1	0	1
Council Elections	328	150	478	218	696	-582	114	218	332	218	550
Partnership Reserves	2,659	-699	1,960	-10	1,950	-10	1,940	-1,892	48	-10	38
On Street Car Parking	1,997	250	2,247	0	2,247	0	2,247	0	2,247	0	2,247
Transformation Reserve	3,193	-526	2,667	-467	2,200	-60	2,140	0	2,140	0	2,140
Demographic Risk Reserve	0	3,000	3,000	3,000	6,000	3,000	9,000	4,000	13,000	4,000	17,000
Youth Provision Reserve	0	500	500	-500	0	0	0	0	0	0	0
Budget Prioritisation Reserve	4,890	-3,286	1,604	603	2,207	823	3,030	1,823	4,853	1,823	6,676
Insurance Reserve	10,647	-1,000	9,647	-1,000	8,647	0	8,647	0	8,647	0	8,647
Business Rates Reserve	555	494	1,049	0	1,049	0	1,049	0	1,049	0	1,049
Capital Reserves	31,188	1,517	32,705	700	33,405	-8,600	24,805	-482	24,323	2,200	26,523
Budget Equalisation Reserve	280	-280	0	0	0	0	0	2,754	2,754	2,441	5,195
Redundancy Reserve	0	700	700	2,000	2,700	1,000	3,700	0	3,700	0	3,700
Investment Pump Priming Reserve	0	0	0	2,000	2,000	0	2,000	0	2,000	0	2,000
Total Reserves	92,300	-25,687	66,613	-10,011	56,602	-14,416	42,186	-1,707	40,479	5,178	45,657
Total Reserves Excluding Schools	74,991	-20,936	54,055	-3,426	50,629	-11,241	39,388	-98	39,290	5,600	44,890
* Includes DSG High Needs Reserve	0	-12,012	-12,012	-6,600	-18,612	-5,000	-23,612	-5,000	-28,612	-5,000	-33,612

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Planning Regulation							
To contribute to cost of deciding on minerals and waste development control	Discretionary	Standard Searches	£53.30	£55.00	01/04/2020	3.2%	NB
		Extended Searches	£91.00	£93.00	01/04/2020	2.2%	NB
To contribute to cost of providing pre-application advice to applicants/developers - Minor Developments	Discretionary	Written response	£203.00	£207.00	01/04/2020	2.0%	NB
		Meeting and follow-up written response	£291.00	£297.00	01/04/2020	2.1%	NB
		Specialist officers to attend meetings (per additional officers)	£73.00	£75.00	01/04/2020	2.7%	NB
To contribute to cost of providing pre-application advice to applicants/developers - Major Developments	Discretionary	Written response	£291.00	£297.00	01/04/2020	2.1%	NB
		Meeting and follow-up written response	£577.00	£590.00	01/04/2020	2.3%	NB
		Specialist officers to attend meetings (per additional officers)	£73.00	£75.00	01/04/2020	2.7%	NB
To contribute to cost of providing pre-application advice to developers of larger developments (bespoke service)	Discretionary	Senior Planner - day rate	£420.00	£428.00	01/04/2020	1.9%	NB
		Principal Planner - day rate	£461.00	£470.00	01/04/2020	2.0%	NB
		Locality Manager - day rate	£594.00	£606.00	01/04/2020	2.0%	NB
To contribute to cost of providing the development control service	Statutory	Clearance of conditions on planning permissions	£116.00	£116.00	01/04/2020	0.0%	NB
Charging for Monitoring of Minerals Sites	Statutory	Active Sites	£397.00	£397.00	01/04/2020	0.0%	NB
		Dormant Sites	£132.00	£132.00	01/04/2020	0.0%	NB
Cover Administration and Supervision Costs for S.38 & S.278 agreements relating	Discretionary	Percentage of Capital cost	9%	9%	n/a	0.0%	NB
		Minimum charge	£2,202.00	£2,202.00	01/04/2020	0.0%	NB
Charging administration fee for managing & monitoring S.106 agreements relating to planning permissions	Discretionary	Various s106 contributions :					NB
		Up to £10,000	£100.00	£100.00	01/04/2020	0.0%	NB
		£10,001 - £25,000	£250.00	£250.00	01/04/2020	0.0%	NB
		£25,001 - £50,000	£500.00	£500.00	01/04/2020	0.0%	NB
		£50,001 - £150,000	£1,500.00	£1,500.00	01/04/2020	0.0%	NB
		£150,001 - £500,000	£3,750.00	£3,750.00	01/04/2020	0.0%	NB
		£500,001-£1,000,000	£5,000.00	£5,000.00	01/04/2020	0.0%	NB
		£1,000,001 - £2,000,000	0.5% of contribution cost	0.5% of contribution cost	01/04/2020		NB
Over £2,000,000	£10,000 plus 0.05% of any contribution in excess of £2m	£10,000 plus 0.05% of any contribution in excess of £2m	01/04/2020		NB		
Specialist Ecological Planning Advice for District Authorities (hourly rate, senior staff)	Discretionary	NB note change from hourly rate to daily rate in line with other similar planning charges (line 13, 14,15),	£461.00	£461.00	01/04/2020	n/a	NB
Protected Species Advice to District Authorities (hourly rate)	Discretionary	hourly rate	£51.40	£51.40	01/04/2020	0.0%	NB

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Specialist Ecological Planning Advice for District Authorities (hourly rate - normal)	Discretionary	NB note change from hourly rate to daily rate in line with other similar planning charges (line 13, 14,15),	£420.00	£420.00	01/04/2020	n/a	NB
To recover the actual reasonable cost of Historic Environment Record (HER) consultations	Discretionary	Charge for digitised HER data to commercial organisations based on the recovery of costs and the number of records. Minimum Charge (no maximum charge)	£104.00	£104.00	01/04/2020	0.0%	NB
To recover the actual reasonable cost of monitoring fieldwork.	Discretionary	Charge for monitoring of archaeological fieldwork based uopn the number of visits .	£52.00 to £260.00	£52.00 to £260.00	01/04/2020	n/a	NB
		additional visits	£80.00	£80.00	01/04/2020	0.0%	NB
Pre-Application Charges for Highways Advice							
<10 dwellings	Discretionary	Meeting/Site Visit + Additional Written Response	£0.00	£300.00	01/04/2020	New Charge	SR
10-24 Dwellings:	Discretionary	Additional Written Response	£246.00	£300.00	01/04/2020	22.0%	SR
		Meeting/Site Visit + Additional Written Response	£369.00	£500.00	01/04/2020	35.5%	SR
25-49 Dwellings	Discretionary	Additional Written Response	£492.00	£500.00	01/04/2020	1.6%	SR
		Meeting/Site Visit + Additional Written Response	£737.00	£750.00	01/04/2020	1.8%	SR
50-99 Dwellings	Discretionary	Additional Written Response	£983.00	£1,000.00	01/04/2020	1.7%	SR
		Meeting/Site Visit + Additional Written Response	£1,464.00	£1,500.00	01/04/2020	2.5%	SR
100-199 Dwellings	Discretionary	Additional Written Response	£1,280.00	£1,750.00	01/04/2020	36.7%	SR
		Meeting/Site Visit + Additional Written Response	£1,945.00	£2,250.00	01/04/2020	15.7%	SR
200-399 Dwellings or 1,000m2-4, 999m2 B1-B8 (Business) or 1,000-3,499m2 A1 (Retail) Use	Discretionary	Additional Written Response	£1,536.00	£2,500.00	01/04/2020	62.8%	SR
		Meeting/Site Visit + Additional Written Response	£2,304.00	£3,000.00	01/04/2020	30.2%	SR
400 or more Dwellings or 5,000m2 or more B1-B8 (Business) or 3,500m2 or more A1 (Retail) Use	Discretionary	Additional Written Response	£2,048.00	£3,500.00	01/04/2020	70.9%	SR
		Meeting/Site Visit + Additional Written Response	£2,560.00	£4,250.00	01/04/2020	66.0%	SR

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Highways							
Temporary Traffic Regulation Orders (Please note no refunds are available for cancelled TTO's)	Discretionary	Routine Temporary TRO	£2,000.00	£2,040.00	01/04/2020	2.0%	NB
		Emergency Notice 1-5 Days	£850.00	£867.00	01/04/2020	2.0%	NB
		Emergency Notice 1-21 Days	£1,400.00	£1,428.00	01/04/2020	2.0%	NB
		Repeat Emergency Closure	£1,400.00	£1,428.00	01/04/2020	2.0%	NB
		Special Events - basic order	£2,000.00	£2,040.00	01/04/2020	n/a	NB
		Advertising, maintenance of notices and exceptional staff time		At cost	01/04/2020	New Charge	NB
Traffic Regulation Orders	Discretionary	Standard Traffic Regulation Order	£3,120.00	£3,190.00	01/04/2020	2.2%	NB
		Other Consultation Requiring placing of a single newspaper notice and no input from legal team - includes pedestrian crossings; traffic calming schemes and incorporating road humps	£1,800.00	£1,840.00	01/04/2020	2.2%	NB
		Other consultation not requiring placing of a newspaper notice	£1,600.00	£1,640.00	01/04/2020	2.5%	NB
		Parking permit exclusions requiring Traffic Regulation Order amendment arising from planning permission for a new development	£2,200.00	£2,250.00	01/04/2020	2.3%	NB
		Advertising, maintenance of notices and exceptional staff time		At cost	01/04/2020	New Charge	NB
		Removal of unauthorised signs	Discretionary	Signs under 0.5 sq. metre in area	£195.00	£200.00	01/04/2020
Signs over 0.5 sq. metre in area	£260.00	£265.00		01/04/2020	1.9%	NB	
Tourism Signs	Discretionary	Assessing application and detailed site assessment	£280.00	£285.00	01/04/2020	1.8%	NB
		Design, manufacture & erection	Cost +15%	Cost +15%	01/04/2020	0.0%	SR
		Maintenance & removal	2/3 x (b) above	2/3 x (b) above	01/04/2020	0.0%	SR
Private access protection road markings	Discretionary		£125.00	£128.00	01/04/2020	2.4%	NB
Directional Signage - New Developments	Discretionary	Agreement and authorisation/approval of sites and signs (per hour)	£60.00	£62.00	01/04/2020	3.3%	SR
		Design Services (per hour)	£60.00	£62.00	01/04/2020	3.3%	SR
		Installation Supervision (per hour)	£60.00	£62.00	01/04/2020	3.3%	SR

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Design Work on Street Lighting for New Developments	Discretionary	Minimum Charge	1 - 5 Columns £800 6 - 15 Columns £1,120 16 - 25 Columns £1,400 26 - 50 Columns £1,680 Over 50 Columns £2,240	1 - 5 Columns £815 6 - 15 Columns £1,140 16 - 25 Columns £1,430 26 - 50 Columns £1,710 Over 50 Columns £2,280	01/04/2020	1.8%	SR
Re-submission of Design Work on Street Lighting	Discretionary		1 - 25 columns £600 Above 25 columns £800	1 - 25 columns £610 Above 25 columns £815	01/04/2020	1.7%	SR
Supply of traffic accident data (planning matter or other professional purpose)	Discretionary	first location / date range	£155.00	£160.00	01/04/2020	3.2%	SR
		second and each subsequent location / date range	£90.00	£92.00	01/04/2020	2.2%	SR
		search of records to establish if there is any relevant data	£45.00	£46.00	01/04/2020	2.2%	SR
Reinstatement of Trenches - Site Supervision by Highways Inspectors (Fixed charge under NRSWA)	Statutory	Standard Charge for Defect Inspections set by Statutory Regulation	£50.00	£50.00	01/04/2020	0.0%	NB
		Standard Charge for Sample Inspections set by Statutory Regulation	£50.00	£50.00	01/04/2020	0.0%	NB
Oxfordshire Permit Scheme - Permit Fees	Discretionary	Permit fee for working on the highway network.	Scale of charges determined by the Oxfordshire Permit Scheme and national regulation	Various as per scale of charges	01/04/2020	n/a	NB
Application fee for S278 works (non statutory works promoters) to book space on the highway.	Discretionary	Per application	£110.00	£240.00	01/04/2020	118.0%	

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Commuted fee for licence of private apparatus in the highway, including the admin cost of maintaining the licence record (S50)	Statutory		£750 + £165 inspection fee for the first 200m and an additional fee of £165 for every 200m thereafter.	£880 + £168 inspection fee for the first 200m and an additional fee of £168 for every 200m thereafter.	01/04/2020	17.0%	NB	
Fixed Penalty Notice income from statutory undertakers for non-compliance with	Statutory	Per Notice	£120.00	£120.00	01/04/2020	0.0%	NB	
		Discounted Rate	£80.00	£80.00	01/04/2020	0.0%	NB	
Charge to public utilities for outstaying prescribed and/or reasonable periods for their works in the highway. Fixed under NRSWA	Statutory		Various as per scale of charges	Various as per scale of charges	01/04/2020	n/a	NB	
Filming Policy - On or in the vicinity of the Highway - Application Fee for permission to film	Discretionary	Small - 1 - 10 crew	Minimum admin fee £300/negotiable	£75 to £300 depending on number of days filming and complexity of project.	01/04/2020	n/a	NB	
		Medium - 11 - 29 crew	Minimum admin fee £2,000 / negotiable	£300 to £1,200 depending on number of days filming and complexity of project.	01/04/2020	n/a	NB	
		Large - 20 - 40 crew	Minimum admin fee £4,000 / negotiable	£500 to £2,000 depending on the number of days filming and complexity of project.	01/04/2020	n/a	NB	
		Large Plus - 41+ crew		£2,000 minimum fee (fees above this rate are subject to negotiation.	01/04/2020	n/a	NB	
		Advertising, maintenance of notices and exceptional staff time at cost + admin fee. Charge per hour.			£50 per hour	01/04/2020	New Charge	NB

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Vehicle Crossings	Discretionary	Residential Non-classified Roads	£110.00	£160.00	01/04/2020	45.5%	NB
		Residential Classified Roads	£200.00	£265.00	01/04/2020	32.5%	NB
		Multiple access and commercial use Non-classified Roads	£440.00	£505.00	01/04/2020	14.8%	NB
		Multiple access and commercial use Classified Roads	£600.00	£665.00	01/04/2020	10.8%	NB
		Temporary vehicle crossing to allow access to a new development in advance of formal S278 sign off	£800.00	£930.00	01/04/2020	16.3%	NB
		Enforcement for non-compliance with vehicle crossing (non-applications, not to specification)	£50 per hour	£51 per hour	01/04/2020	2.0%	NB
Highway Material Storage Licence	Discretionary	Licence	£80.00	£81.60	01/04/2020	2.0%	NB
		Retrospective Licence	£110 + enforcement hourly rate	£112.50 + enforcement hourly rate	01/04/2020	2.3%	NB
		Enforcement for non-compliance / No consent for all licence fees that do not have existing prescribed enforcement fees.	Fine £150 + £50 per hour enforcement hourly rate	Fine £153 + £51 per hour enforcement hourly rate	01/04/2020	2.0%	NB
Skip Licence	Discretionary	Licence	£65.00	£67.00	01/04/2020	3.1%	NB
		Licence Renewal	£65.00	£67.00	01/04/2020	3.1%	NB
		One day Licence	£65.00	£67.00	01/04/2020	3.1%	NB
		Late renewal (more than 5 working days to be classed as new application)	£70.00	£72.00	01/04/2020	2.9%	NB
		Retrospective Licence	£150 + enforcement hourly rate	£153 + hourly enforcement rate	01/04/2020	2.0%	NB
Scaffolding Licences	Discretionary	Initial Licence - one month occupation	£135.00	£138.00	01/04/2020	2.2%	NB
		Renewal - one month occupation	£135.00	£138.00	01/04/2020	2.2%	NB
		Retrospective Licence	£220 + enforcement hourly rate	£225 + enforcement hourly rate	01/04/2020	2.3%	NB
Tower Scaffolding Licences/Cherry Picker / Small Lift	Discretionary	Intitial Licence 2 days occupation	£110.00	£113.00	01/04/2020	2.7%	NB
		Renewal - 2 days occupation	£110.00	£113.00	01/04/2020	2.7%	NB
		Retrospective Licence	£220 + enforcement hourly rate	£225 + hourly enforcement rate	01/04/2020	2.3%	NB

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Cranes	Discretionary	Licence	£400.00	£410.00	01/04/2020	2.5%	NB
		Retrospective Licence	£550 + enforcement hourly rate	£561 + hourly enforcement rate	01/04/2020	2.0%	NB
Hoarding Consents	Discretionary	Initial Licence - one month occupation	£135.00	£138.00	01/04/2020	2.2%	NB
		Renewal - one month occupation	£135.00	£138.00	01/04/2020	2.2%	NB
		Retrospective Licence	£220 + enforcement hourly rate	225 + enforcement hourly rate	01/04/2020	2.3%	NB
Oversailing Consents - structures oversailing the highway	Discretionary	Licence	£350.00	£357.00	01/04/2020	2.0%	NB
		Retrospective Licence	£550 + enforcement hourly rate	£561 + enforcement hourly rate	01/04/2020	2.0%	NB
Annual Charge for Table & Chairs Licence	Discretionary	Up to 2 tables & 8 seats	£200.00	£204.00	01/04/2020	2.0%	NB
		For 3 to 4 tables & up to 16 seats	£500.00	£510.00	01/04/2020	2.0%	NB
		For 5 to 10 tables & up to 40 seats	£900.00	£918.00	01/04/2020	2.0%	NB
		For 11 or more tables & over 40 seats	£1,400.00	£1,428.00	01/04/2020	2.0%	NB
Approving traffic Management plans and signage schedules	Discretionary	per hour	£50.00	£51.00	01/04/2020	2.0%	NB
Providing Pre contract information on CTMP and general requirements	Discretionary	per hour	£50.00	£51.00	01/04/2020	2.0%	NB
Supply of Highway related information, including Personal Search Fees	Discretionary	Highway extent	£35.00	£36.00	01/04/2020	2.9%	SR
		Highway extent per additional question	£12.00	£12.50	01/04/2020	4.2%	SR
		Con29 property search	£35.00	£36.00	01/04/2020	2.9%	SR
		Extensive highway boundary extent	£86.00	£88.00	01/04/2020	2.3%	SR
		Highway Extent research/survey	£373.00	£385.00	01/04/2020	3.2%	SR
Supply of Conveyancing 29 Highway Search Information	Discretionary		£9,000.00	£9,000.00	01/04/2020	0.0%	NB
Supply of Manual Traffic Survey Data (when a commercial request to conduct a traffic survey is received)	Discretionary	Small Manual Classified Count	£265.00	£275.00	01/04/2020	3.8%	SR
	Discretionary	Medium Manual Classified Count	£425.00	£435.00	01/04/2020	2.4%	SR
	Discretionary	Large Manual Classified Count	£640.00	£655.00	01/04/2020	2.3%	SR
Supply of Automatic Traffic Count Data to commercial organisations	Discretionary	1st Location - 1 week's data	£150.00	£155.00	01/04/2020	3.3%	SR
	Discretionary	1st Location - additional weeks data	£27.00	£32.00	01/04/2020	18.5%	SR
	Discretionary	2nd and subsequent location - 1 weeks data	£80.00	£85.00	01/04/2020	6.3%	SR
	Discretionary	Collating Data from Multiple sites	£43.00	£55.00	01/04/2020	27.9%	SR

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Supply of Radar Speed Data to commercial organisations	Discretionary	1st Location - 1 week's data	£113.00	£155.00	01/04/2020	37.2%	SR
		1st Location - additional weeks data	£31.00	£32.00	01/04/2020	3.2%	SR
		2nd and subsequent location - 1 weeks data	£77.00	£85.00	01/04/2020	10.4%	SR
		Collating Data from Multiple sites	£51.00	£55.00	01/04/2020	7.8%	SR
Agreement for temporary traffic counter on highway	Discretionary		£31.00	£35.00	01/04/2020	12.9%	NB
Definitive Map and Commons							
As made, the Local Authorities (Recovery of Costs for Public Path Orders) Regulations 1993 http://modgov.sefton.gov.uk/moderngov/Dat	Statutory	Orders confirmed unopposed	£3,410.00	£3,500.00	01/04/2020	2.6%	NB
		Orders confirmed - objections withdrawn	£3,900.00	£4,000.00	01/04/2020	2.6%	NB
		Orders opposed - not proceeded with	£4,130.00	£4,225.00	01/04/2020	2.3%	NB
		Orders opposed - submitted to SoS	£4,990.00	£5,100.00	01/04/2020	2.2%	NB
Commons Registration Authority Charges							
Common searches (new Con290 form due 14/15 or after)		Initial Search	£39.60	£42.00	01/04/2020	6.1%	NB
		Per additional land parcel	£0.00	£1.00	01/04/2020	N/A	NB
Corrective applications under Commons Act 2006 Schedule 2 para 6&9 (standard, no inquiry)	Discretionary	per application	-	£1,080.00	01/04/2020	N/A	NB
Corrective applications additional inquiry stage para 6	Discretionary		-	£3,400.00	01/04/2020	N/A	NB
Corrective applications additional inquiry stage para 7	Discretionary		-	£2,800.00	01/04/2020	N/A	NB
Corrective applications additional inquiry stage para 8	Discretionary		-	£3,300.00	01/04/2020	N/A	NB
Corrective applications additional inquiry stage para 9	Discretionary		-	£3,400.00	01/04/2020	N/A	NB
Landowner statements and declarations (public rights of way)	Discretionary	Standard fee per application (incl up to 2 land parcels)	£280.00	£290.00	01/04/2020	3.6%	EX
		Fee per application (3-4 land parcels)	£305.00	£315.00	01/04/2020	3.3%	EX
		Fee per application (5-7 land parcels)	£345.00	£360.00	01/04/2020	4.3%	EX
		Additional parcels beyond 7	£73.00	£75.00	01/04/2020	2.7%	EX
Supply of Highway (rights of way) related information	Discretionary	Written response to standard enquiry	£49.00	£50.00	01/04/2020	2.0%	SR
	Discretionary	Written response to extensive enquiry	£65.00	£70.00	01/04/2020	7.7%	SR

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Park and Ride							
Park and Ride Car Park charges - Thornhill & Water Eaton only	Discretionary	Up to 1 hr	free	free	01/04/2020	no change	NB
		1-11 hrs	£2.00	£2.00	01/04/2020	0.0%	NB
		11-24 hrs	£4.00	£4.00	01/04/2020	0.0%	NB
		24-48 hrs	£8.00	£8.00	01/04/2020	0.0%	NB
		48-72 hrs	£12.00	£12.00	01/04/2020	0.0%	NB
		Monthly Season ticket	£30.00	£30.00	01/04/2020	0.0%	NB
		Quarterly Season Ticket	£85.00	£85.00	01/04/2020	0.0%	NB
		Annual Season ticket	£300.00	£300.00	01/04/2020	0.0%	NB
		Excess Notices - Fines paid within 14 days	£50.00	£50.00	01/04/2020	0.0%	NB
		Excess Notices - Fines paid after 14 & up to 28 days	£100.00	£100.00	01/04/2020	0.0%	NB
On-Street Parking - Pay and Display							
Oxford City Centre - Central Area	Discretionary	Sunday - Friday 8am -6.30pm :					
		1 hour	£4.00	£4.60	01/04/2020	15.0%	NB
		2 hours	£6.00	£7.40	01/04/2020	23.3%	NB
		Sunday - Friday evenings	£4.00	£4.60	01/04/2020	15.0%	NB
		Saturday 1 hour	£4.50	£4.60	01/04/2020	2.2%	NB
		Saturday 2 hours	£7.30	£7.40	01/04/2020	1.4%	NB
		Saturday evenings	£4.50	£4.60	01/04/2020	2.2%	NB
Oxford City Centre - Outer Areas	Discretionary	Monday - Saturday 8am-6.30pm :					
		1 hour	£3.00	£3.20	01/04/2020	6.7%	NB
		3 hours	£4.00	£4.20	01/04/2020	5.0%	NB
		Evenings/Sundays	£3.00	£3.20	01/04/2020	6.7%	NB
Abingdon 8am-6pm (excl. Sundays, B Hols.) 1984 Act	Discretionary	1 hour	£0.50	£0.60	01/04/2020	20.0%	NB
		2 hours (the maximum)	£0.80	£1.00	01/04/2020	25.0%	NB
		Visitor permit (24 hours)	£0.50	£1.00	01/04/2020	100.0%	NB
Abingdon - Excess Charge Notices	Discretionary	Excess Charge fees for contravention of parking regulations	£40 discounted to £20	£50 discounted to £25	01/04/2020		
Henley 8am-6pm (excl. Sundays, B Hols.)	Discretionary	1 hour	£0.50	£0.60	01/04/2020	20.0%	NB
		2 hours (the maximum)	£0.80	£1.00	01/04/2020	25.0%	NB
		Visitors permit (24 hours)	£0.50	£1.00	01/04/2020	100.0%	NB
Henley - Excess Charge Notices	Discretionary	Excess Charge fees for contravention of parking regulations	£40 discounted to £20	£50 discounted to £25	01/04/2020		NB
Wallingford 8am-6pm (excl. Sundays, Bank holidays)	Discretionary	1.5 hours (the maximum)	£0.30	£0.40	01/04/2020	33.3%	NB

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Wallingford - Excess Charge Notices	Discretionary	Excess Charge fees for contravention of parking regulations	£40 discounted to £20	£50 discounted to £25	01/04/2020		NB
Vehicle Removal Charge	Discretionary		£105.00	£105.00	01/04/2020	0.0%	NB
Parking Permits							
Oxford (per annum)	Discretionary	Oxford residents (excl. Kassam stadium) 1st & 2nd Car	£60.00	£65.00	01/04/2020	8.3%	NB
		Oxford residents (excl. Kassam stadium) 3rd Car	£120.00	£130.00	01/04/2020	8.3%	NB
		Oxford residents (excl. Kassam stadium) 4th Car	£180.00	£200.00	01/04/2020	11.1%	NB
		Oxford residents (Kassam stadium area)	£15.00	£16.00	01/04/2020	6.7%	NB
		Business permits - Annual	£100.00	£150.00	01/04/2020	50.0%	NB
		Business Permits - 9 months	£75.00	£115.00	01/04/2020		
		Business Permits - 6 months	£50.00	£75.00	01/04/2020		
		Business Permits - 3 months	£25.00	£40.00	01/04/2020		
		Business Permits - Change of Vehicle	£0.00	£15.00	01/04/2020		
		Traders permits per week	£20.00	£25.00	01/04/2020	25.0%	NB
		Visitors permits - First 25	Free	Free	01/04/2020		NB
		Visitors permits - 2nd 25 (total cost)	£20.00	£25.00	01/04/2020	25.0%	NB
Abingdon Residents Parking (per annum)	Discretionary	Parking permit	£100.00	£110.00	01/04/2020	10.0%	NB
		Visitors permits - First 25	Free	Free	01/04/2020		NB
		Visitors permits - 2nd 25 (total cost)	£20.00	£25.00	01/04/2020	25.0%	NB
Henley Residents Parking (per annum)	Discretionary	Parking permit	£80.00	£100.00	01/04/2020	25.0%	NB
		Visitors permits - First 25	Free	Free	01/04/2020		NB
		Visitors permits - 2nd 25 (total cost)	£20.00	£25.00	01/04/2020	25.0%	NB
Excess Charges/ Penalty Notices/ Enforcement							
Excess Charge Notices	Discretionary	Fines paid within 14 days	£20.00	£25.00	01/04/2020	25.0%	NB
		Fines paid after 14 & up to 28 days	£40.00	£50.00	01/04/2020	25.0%	NB
Penalty Charge Notices - higher contraventions	Statutory	Fines paid within 14 days	£35.00	£35.00	01/04/2020	0.0%	NB
		Fines paid after 14 & up to 28 days	£70.00	£70.00	01/04/2020	0.0%	NB
Penalty Charge Notices - lower contraventions	Statutory	Fines paid within 14 days	£25.00	£25.00	01/04/2020	0.0%	NB
		Fines paid after 14 & up to 28 days	£50.00	£50.00	01/04/2020	0.0%	NB
Bus Lane Camera Enforcement	Statutory	Fines paid within 14 days	£30.00	£30.00	01/04/2020	0.0%	NB
		Fines paid after 14 & up to 28 days	£60.00	£60.00	01/04/2020	0.0%	NB

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Waste Management							
Chargeable waste scheme at Dix Household Waste Recycling Centres	Discretionary	Disposal of Large Scale DIY Waste	£1.50	£1.50	01/04/2020	0.0%	NB
		Standard motorcycle and car tyres	£5.00	£5.00	01/04/2020	0.0%	NB
		Plaster/plasterboard per bag	£2.50	£2.50	01/04/2020	0.0%	NB
		Plasterboard sheet up to 2m x 1m	£10.00	£10.00	01/04/2020	0.0%	NB
Supported Transport							
Comet Bus - Transport from your door to destination - for anyone without access to suitable public transport	Discretionary	Exclusive use - Five mile journey	£7.00	£7.00	01/04/2020	0.0%	NB
		Shared travel - Five mile journey	£3.50	£3.50	01/04/2020	0.0%	NB
		Organisations/groups - Per hour	£20.00	£20.00	01/04/2020	0.0%	NB
School Meals							
Pupils	Discretionary	per meal	£2.30	£2.40	01/09/2020	4.3%	NB
Adults	Discretionary	per meal	£3.30	£3.40	01/09/2020	3.0%	SR
Fire and Rescue Service							
Special Services	Discretionary	Personnel, regardless of rank, per hour or part hour.	£51.30	£19.16	01/04/2020	-62.7%	SR
		Aerial Ladder Platform per hour or part hour excluding petrol	£264.25	£264.25	01/04/2020	0.0%	SR
		Vehicles/appliances exceeding 2 tons (unladen) per hour or part hour	£102.90	£175.50	01/04/2020	70.6%	SR
		Vehicles/appliances NOT exceeding 2 tons (unladen) per hour or part hour	£69.15	£69.15	01/04/2020	0.0%	SR
Fire Reports	Discretionary	Preparation of Fire Report	FREE	FREE	01/04/2020	n/a	NB
		Preparation of a Fire Investigation Report - short or extracted	£320.00	£320.00	01/04/2020	0.0%	NB
		Preparation of a Fire Investigation Report - full report or one involving extensive enquiries, photographs etc	£430.00	£430.00	01/04/2020	0.0%	NB
		Preparation of a Fire Investigation Report - full report or one on major incidents requiring extensive protracted investigation etc	£630.00	£630.00	01/04/2020	0.0%	NB
		Insurance Interviews	£89.00	£89.00	01/04/2020	0.0%	NB
Annual charge made to alarm receiver centres and users of dedicated dial in facilities in respect of unwanted fire alarms	Discretionary		£476.00	£476.00	01/04/2020	0.0%	SR

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Trading Standards - Licenses							
Licence to store explosives where, by virtue of regulation 27 of, and Schedule 5 to, the 2014 Regulations, a minimum separation distance of greater than 0 metres is prescribed	Statutory	1 year	£185.00	£185.00	01/04/2020	0.0%	NB
		2 years	£243.00	£243.00	01/04/2020	0.0%	NB
		3 years	£304.00	£304.00	01/04/2020	0.0%	NB
		4 years	£374.00	£374.00	01/04/2020	0.0%	NB
		5 years	£423.00	£423.00	01/04/2020	0.0%	NB
Renewal of licence to store explosives where a minimum separation distance of greater than 0 metres is prescribed (Explosive Goods Act 1875 and 1923)	Statutory	1 year	£86.00	£86.00	01/04/2020	0.0%	NB
		2 years	£147.00	£147.00	01/04/2020	0.0%	NB
		3 years	£206.00	£206.00	01/04/2020	0.0%	NB
		4 years	£266.00	£266.00	01/04/2020	0.0%	NB
		5 years	£326.00	£326.00	01/04/2020	0.0%	NB
Licence to store explosives where no minimum separation distance or a 0 metres minimum separation distance is prescribed (Explosive Goods Act 1875 and 1923)	Statutory	1 year	£109.00	£109.00	01/04/2020	0.0%	NB
		2 years	£141.00	£141.00	01/04/2020	0.0%	NB
		3 years	£173.00	£173.00	01/04/2020	0.0%	NB
		4 years	£206.00	£206.00	01/04/2020	0.0%	NB
		5 years	£238.00	£238.00	01/04/2020	0.0%	NB
Renewal of licence to store explosives where no minimum separation distance or a 0 metres minimum separation distance is prescribed (Explosive Goods Act 1875 and 1923)	Statutory	1 year	£54.00	£54.00	01/04/2020	0.0%	NB
		2 years	£86.00	£86.00	01/04/2020	0.0%	NB
		3 years	£120.00	£120.00	01/04/2020	0.0%	NB
		4 years	£152.00	£152.00	01/04/2020	0.0%	NB
		5 years	£185.00	£185.00	01/04/2020	0.0%	NB
Varying a licence under Explosive Goods Act 1875 and 1923	Statutory	Varying name or address	£36.00	£36.00	01/04/2020	0.0%	NB
		Transfer of licence/registration	£36.00	£36.00	01/04/2020	0.0%	NB
		Replacement of licence/registration	£36.00	£36.00	01/04/2020	0.0%	NB
Statutory Charge for issuing a licence to store petroleum under Dangerous Substances and Explosive Atmospherics Regulations 2002	Statutory	Not exceeding 2,500 litres	£44.00	£44.00	01/04/2020	0.0%	NB
		Exceeding 2,500 litres but less than 50,000 litres	£60.00	£60.00	01/04/2020	0.0%	NB
		Over 50,000 litres	£125.00	£125.00	01/04/2020	0.0%	NB
Trading Standards - Verifying weights and measures							
Testing fees - weights and measures	Discretionary	Hourly Rate	£84.50	£88.75	01/04/2020	5.0%	SR
Weighing instruments	Discretionary	49Kg or less - First item	£44.75	£88.75	01/04/2020	98.3%	SR
		Reduced fee for second item	£36.50	£72.75	01/04/2020	99.3%	SR
		Reduced fee for 3 items or more	£35.00	£69.00	01/04/2020	97.1%	SR
		Over 50Kg to 1,000kg - First item	£75.25	£115.00	01/04/2020	52.8%	SR
		Reduced fee for second item	£60.00	£91.00	01/04/2020	51.7%	SR
		Reduced fee for 3 items or more	£57.00	£85.00	01/04/2020	49.1%	SR
		Over 1,000kg to 10t - First item	£232.50	£237.25	01/04/2020	2.0%	SR
		Reduced fee for second item	£187.00	£190.75	01/04/2020	2.0%	SR
		Over 10t to 60t - First item	£387.00	£394.75	01/04/2020	2.0%	SR
Reduced fee for second item	£310.00	£316.25	01/04/2020	2.0%	SR		
Surcharge for testing outside normal hours (Outside 8:30-17:00, Monday to Friday and	Discretionary	Trading Standards Officer, per hour	£13.50	£13.75	01/04/2020	1.9%	SR
		Non Trading Standards Officer, per hour	£9.00	£9.25	01/04/2020	2.8%	SR

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Surcharge for testing outside normal hours (Sunday and Bank Holidays)	Discretionary	Trading Standards Officer, per hour	£26.00	£26.50	01/04/2020	1.9%	SR
		Non Trading Standards Officer, per hour	£18.00	£18.50	01/04/2020	2.8%	SR
Weights	Discretionary	500mg - 5Kg - First item	£7.00	£7.25	01/04/2020	3.6%	SR
		Second and subsequent items	£5.75	£6.00	01/04/2020	4.3%	SR
		Below 500mg and above 5KG - First item	£11.25	£11.50	01/04/2020	2.2%	SR
		Second and subsequent items	£8.50	£8.75	01/04/2020	2.9%	SR
Measuring instruments for Liquid fuel and Lubricants	Discretionary	Per Nozzle - First item	£128.00	£130.50	01/04/2020	2.0%	SR
		Second and subsequent items on same site	£79.75	£81.50	01/04/2020	2.2%	SR
		Testing peripheral electronic equipment on a separate visit (per site)	£87.00	£88.75	01/04/2020	2.0%	SR
		Testing of credit card acceptor (per unit, regardless of number of nozzles etc)	£87.00	£88.75	01/04/2020	2.0%	SR
Measuring instruments - Intoxicating liqueur	Discretionary	150ml or less - First item	£18.50	£19.00	01/04/2020	2.7%	SR
		Second and subsequent items	£15.00	£15.50	01/04/2020	3.3%	SR
		Above 150ml - First item	£22.75	£23.25	01/04/2020	2.2%	SR
		Second and subsequent items	£18.00	£18.50	01/04/2020	2.8%	SR
Length measures	Discretionary	3 metres or less - First item	£11.25	£11.50	01/04/2020	2.2%	SR
		Second and subsequent items	£8.50	£8.75	01/04/2020	2.9%	SR
		1 litre or less - First item	£7.00	£7.25	01/04/2020	3.6%	SR
		Second and subsequent items	£5.50	£5.75	01/04/2020	4.5%	SR
Capacity measures	Discretionary	Cubic ballast measures	£191.00	£195.00	01/04/2020	2.1%	SR
		Average quantity measures	£31.00	£31.75	01/04/2020	2.4%	SR
		Average quantity templates - First item	£53.25	£54.50	01/04/2020	2.4%	SR
		Second and subsequent items	£21.00	£21.50	01/04/2020	2.4%	SR
Pharmaceutical measures at manufacturers premises	Discretionary	0-50 items - 5 graduations	£3.06	£3.15	01/04/2020	3.0%	SR
		- 6 graduations	£3.27	£3.35	01/04/2020	2.5%	SR
		- 7 to 10 graduations	£4.54	£4.65	01/04/2020	2.5%	SR
		50-100 items - 5 graduations	£2.43	£2.50	01/04/2020	3.1%	SR
		- 6 graduations	£2.64	£2.70	01/04/2020	2.4%	SR
		- 7 to 10 graduations	£3.59	£3.70	01/04/2020	3.2%	SR
		100+ items - 5 graduations	£2.32	£2.40	01/04/2020	3.4%	SR
		- 6 graduations	£2.43	£2.50	01/04/2020	3.1%	SR
- 7 to 10 graduations	£3.38	£3.50	01/04/2020	3.7%	SR		
Trading Standards - Other							
Hire of cattle crush (mobile unit taken to farms / sites for the safe handling of cattle when conducting welfare checks):	Discretionary	Oxfordshire businesses					
		- First day	£295.50	£301.50	01/04/2020	2.0%	SR
		- Subsequent days	£89.75	£92.00	01/04/2020	2.5%	SR
		- Additional fee for re-location per hour	£18.00	£18.50	01/04/2020	2.8%	SR
		Non-Oxfordshire businesses					
		- First day	£353.25	£360.50	01/04/2020	2.1%	SR
		- Subsequent days	£88.50	£90.25	01/04/2020	2.0%	SR
- Additional fee for re-location per hour	£18.00	£18.50	01/04/2020	2.8%	SR		

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Buy with Confidence Trader Approval scheme	Discretionary	First year total for 1-5 employees	£450.00	£450.00	01/04/2020	0.0%	SR	
		First year total for 6-20 employees	£650.00	£650.00	01/04/2020	0.0%	SR	
		First year total for 20-49 employees	£850.00	£850.00	01/04/2020	0.0%	SR	
		Renewal Fee (from 2018/19) for 1-5 employees	£300.00	£300.00	01/04/2020	0.0%	SR	
		Renewal Fee (from 2018/19) for 6-20 employees	£450.00	£450.00	01/04/2020	0.0%	SR	
		Renewal Fee (from 2018/19) for 20-49 employees	£600.00	£600.00	01/04/2020	0.0%	SR	
		Renewal Fee (members prior to April 2017) for 1-5 employees	£125.00	£150.00	01/04/2020	20.0%	SR	
		Renewal Fee (members prior to April 2017) for 6-20 employees	£185.00	£220.00	01/04/2020	18.9%	SR	
		Renewal Fee (members prior to April 2017) for 20-49 employees	£250.00	£300.00	01/04/2020	20.0%	SR	
Petroleum Environmental Searches	Discretionary		£123.25	£144.00	01/04/2020	16.8%	SR	
Primary Authority agreement	Discretionary	10 hours support and registration fee	£599.00	£792.00	01/04/2020	32.2%	NB	
Additional Business Support (per hour)	Discretionary		£56.41	£72.00	01/04/2020	27.6%	SR	
Carrying Agent for imported dogs, cats and other mammals: Includes local authorities within TSSE region (excl Isle of Wight),	Discretionary	Monday to Friday	£263.00	£268.50	01/04/2020	2.1%	NB	
		Saturday and Sunday	£395.00	£403.00	01/04/2020	2.0%	NB	
		Bank Holidays	£526.00	£536.50	01/04/2020	2.0%	NB	
Petroleum Vapour Recovery Services (TBC). Income received from those local authorities where an agreement exists for the provision of vapour recovery services by the Council. Based on a percentage of the relevant permit fee	Statutory	Application						
		- PVR Stage 1	£121.24	£124.00	01/04/2020	2.3%	NB	
		- PVR Stage 1 and 2	£201.52	£205.60	01/04/2020	2.0%	NB	
		Annual Subsistence Charge						
		- PVR Stage 1 (low risk)	£62.26	£63.20	01/04/2020	1.5%	NB	
		- PVR Stage 1 and 2 (low risk)	£88.47	£90.40	01/04/2020	2.2%	NB	
		Transfer						
- Standard Process Transfer	£132.71	£135.20	01/04/2020	1.9%	NB			
- Standard Process Partial Transfer	£389.94	£397.60	01/04/2020	2.0%	NB			
Achieving Best Evidence (ABE) Interview Service - Income received from other local authorities requesting this Service to carryout ABE interviews on their behalf	Discretionary	Time charged per hour, per officer	£56.41	£72.00	01/04/2020	27.6%	SR	
Gypsy & Traveller Service								
Weekly rent of plot to site resident (there are 89 plots across the 6 Oxfordshire sites).	Discretionary	Weekly site rental	£77.00	£79.00	01/04/2020	2.6%	EX	
Rent for nine additional plots at Redbridge	Discretionary	Weekly site rental	£101.00	£103.00	01/04/2020	2.0%	EX	

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Registration Service							
License for approved premises	Discretionary	3 year license	£2,150.00	£2,200.00	01/04/2020	2.3%	NB
Amendment Fee for all Marriage and Civil partnership ceremonies	Discretionary	per amendment	£60.00	£60.00	01/04/2020	0.0%	NB
Amendment Fee for other Civil ceremonies- If the fee for other civil ceremonies attracts VAT so does the amendment fee	Discretionary	per amendment	£60.00	£60.00	01/04/2020	0.0%	SR
Marriage & Civil partnership fees at former Register Office Marriage rooms Monday - Friday during office hours and Saturday mornings between 9.00am and 12 noon. (Includes the cost of one certificate)	Discretionary	Abingdon- Roysse Court (Mon -Fri)	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Banbury Bodicote House	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Bicester - Garth Park	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Didcot - Broadway Room	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Henley - Regatta Court	£292.00	£310.00	01/04/2020	6.2%	NB
		Oxford - Tidmarsh Lane					
	Statutory	RO (Tues only)	£57.00	£57.00	01/04/2020	0.0%	NB
	Discretionary	Dexter Room Tues-Fri	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Dexter Room Sat AM	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Wheatley - Shotover Room	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Witney - Windrush Rooms	£292.00	£310.00	01/04/2020	6.2%	NB
	Discretionary	Total for all district Offices (Sat pm)	£567.00	£585.00	01/04/2020	3.2%	NB
	Discretionary	Total for all district Offices (Sun and BH)	£632.00	£650.00	01/04/2020	2.8%	NB
Statutory	Attending chapel	£90.00	£97.00	01/04/2020	7.8%	NB	
Marriages and Civil Partnerships at Approved Venues (9.00am to 5.30pm)	Discretionary	Monday - Saturday	£517.00	£600.00	01/04/2020	16.1%	NB
		Sunday & Bank Holiday	£632.00	£650.00	01/04/2020	2.8%	NB
Marriages at Approved Venues (on or after 6pm)	Discretionary	Monday - Saturday	£632.00	£670.00	01/04/2020	6.0%	NB
		Sunday & Bank Holiday	£687.00	£730.00	01/04/2020	6.3%	NB

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Conversion of a Civil Partnership into Marriage	Statutory	Standard Service	£45.00	£45.00	01/04/2020	0.0%	NB
		Two stage procedure on other premises - completing the declaration	£27.00	£27.00	01/04/2020	0.0%	NB
		Two stage procedure on other premises - signing the declaration in a religious registered for marriage of same sex couples	£91.00	£91.00	01/04/2020	0.0%	NB
Other Civil Ceremonies (Naming Ceremonies, Renewal of Vows, Partnership/Commitment Ceremonies) at Registration Offices	Discretionary	Monday - Friday	£320.00	£275.00	01/04/2020	-14.1%	SR
		Saturday	£370.00	£310.00	01/04/2020	-16.2%	SR
		Sunday & Bank Holiday	£380.00	£320.00	01/04/2020	-15.8%	SR
		Individual Citizenship Ceremonies (Oxford Register Office only)	£235.00	£235.00	01/04/2020	0.0%	SR
Other Civil Ceremonies (Naming Ceremonies, Renewal of Vows, Partnership/Commitment Ceremonies) at	Discretionary	Monday - Friday	£315.00	£275.00	01/04/2020	-12.7%	SR
		Saturday	£370.00	£310.00	01/04/2020	-16.2%	SR
		Sunday & Bank Holiday	£380.00	£320.00	01/04/2020	-15.8%	SR
Other Civil Ceremonies (Naming Ceremonies, Renewal of Vows, Partnership/Commitment Ceremonies) at venues not approved by Oxfordshire County Council	Discretionary	Monday - Friday	£590.00	£400.00	01/04/2020	-32.2%	SR
	Discretionary	Saturday	£590.00	£410.00	01/04/2020	-30.5%	SR
	Discretionary	Sunday & Bank Holiday	£590.00	£420.00	01/04/2020	-28.8%	SR
	Statutory	Group Citizenship Ceremony at County Hall	£80.00	£80.00	01/04/2020	0.0%	NB
	Discretionary	Your day your way ceremony	£685.00	£720.00	01/04/2020	5.1%	NB/SR
European Union Settlement Scheme	Discretionary	per application	£14.00	£14.00	01/04/2020	0.0%	SR
Births, Deaths Certificates (Marriage inc line 24-46)	Statutory	on day of registration	£11.00	£11.00	01/04/2020	0.0%	NB
		from a current register	£11.00	£11.00	01/04/2020	0.0%	NB
		from a deposited register	£11.00	£11.00	01/04/2020	0.0%	NB
Short Birth Certificate	Statutory	on day of registration	£11.00	£11.00	01/04/2020	0.0%	NB
		from a current register	£11.00	£11.00	01/04/2020	0.0%	NB
		from a deposited register	£11.00	£11.00	01/04/2020	0.0%	NB
Express Certificate Fee stopped now called Statutory Priority Certificate	Statutory	per application	£35.00	£35.00	01/04/2020	0.0%	SR
Searches in indexes	Statutory	General Search	£18.00	£18.00	01/04/2020	0.0%	NB
Notice of Marriages and Civil Partnership	Statutory	Notice of Marriage/Civil Partnership (for 1 person)	£35.00	£35.00	01/04/2020	0.0%	NB
		Extended 70 day Notice for foreign Nationals (for 1 person)	£47.00	£47.00	01/04/2020	0.0%	NB
Commemorative Certificates	Discretionary	per certificate	£10.00	£10.00	01/04/2020	0.0%	SR
Consideration of Foreign Divorce	Statutory	per application	£50.00	£50.00	01/04/2020	0.0%	NB
Consideration of Foreign Divorce (RG involvement)	Statutory	per application	£75.00	£75.00	01/04/2020	0.0%	NB
Space 17 addition	Statutory	per application	£40.00	£40.00	01/04/2020	0.0%	NB
Consideration for a correction	Statutory	per application	£75.00	£75.00	01/04/2020	0.0%	NB
Consideration for a correction (RG involvement)	Statutory	per application	£90.00	£90.00	01/04/2020	0.0%	NB

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Music Service							
Ensembles	Discretionary	Full membership Standard Ensemble lessons	£74.00	£76.00	01/09/2020	2.7%	EX
		Full membership CMS lessons - Central Music School	£102.00	£105.00	01/09/2020	2.9%	EX
		Single ensemble - OCMS lessons	£52.00	£55.00	01/09/2020	5.8%	EX
		Choir Primary	£42.00	£45.00	01/09/2020	7.1%	EX
		Secondary Choir Activity	£52.00	£55.00	01/09/2020	5.8%	EX
		CMS Pass	£154.00	£159.00	01/09/2020	3.2%	EX
		County Level Ensemble 2 hours	£84.00	£87.00	01/09/2020	3.6%	EX
		County Level Ensemble 1.5 hours	£57.50	£60.00	01/09/2020	4.3%	EX
		County Level Ensemble 1 hours	£49.50	£50.00	01/09/2020	1.0%	EX
Individual Tuition	Discretionary	Individual 20 minutes	£18.99	£19.20	01/09/2020	1.1%	EX
		Individual 30 Minutes	£28.49	£29.00	01/09/2020	1.8%	EX
		Individual 40 minutes	£37.99	£39.00	01/09/2020	2.7%	EX
		Individual 45 minutes	£42.74	£44.00	01/09/2020	2.9%	EX
		Individual 60 minutes	£56.99	£59.00	01/09/2020	3.5%	EX
Group Tuition	Discretionary	Group of 2 (30 minutes)	£14.55	£15.00	01/09/2020	3.1%	EX
		Group of 2 (20 minutes)	£9.95	£10.20	01/09/2020	2.5%	EX
		Group of 3-4 (20 minutes)	£6.95	£7.20	01/09/2020	3.6%	EX
Late cancellation Charge	Discretionary	Late Cancellation fee	£40.00	£45.00	01/09/2020	12.5%	EX
Extra late cancellation Charge		Very late cancellation fee	£50.00	£55.00	01/09/2020	10.0%	EX
Own teacher accompanist	Discretionary	Accompanist own teacher	£26.00	£30.00	01/09/2020	15.4%	EX
Not own teacher accompanist	Discretionary	Accompanist Oxfordshire County Music Service teacher	£42.00	£45.00	01/09/2020	7.1%	EX
Hire	Discretionary	Hire of Instruments (Violin, Viola and Guitars only)	£25.00	£27.00	01/09/2020	8.0%	EX
		Hire of Instruments (All other instruments on offer)	£46.00	£48.00	01/09/2020	4.3%	EX
		Instrument Purchase Charge	£70.00	£75.00	01/09/2020	7.1%	SR
		Oxfordshire schools orchestra	£550.00	£575.00	01/09/2020	4.5%	EX
		Oxfordshire Schools Symphony Orchestra	£850.00	£875.00	01/09/2020	2.9%	EX
		Oxfordshire County Youth orchestra	£775.00	£799.00	01/09/2020	3.1%	EX
		Oxfordshire Youth Music Theatre	£480.00	£500.00	01/09/2020	4.2%	EX

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Charges to schools	Discretionary	First Access (60 or 45 minutes)	£1,500.00	£1,550.00	01/09/2020	3.3%	EX
		Play On (1 hour)	£1,810.00	£1,850.00	01/09/2020	2.2%	EX
		Play On (40 minutes)	£1,207.00	£1,230.00	01/09/2020	1.9%	EX
		Play On (30 minutes)	£905.00	£930.00	01/09/2020	2.8%	EX
		Transport Zone 1	£95.00	£100.00	01/09/2020	5.3%	EX
		Transport Zone 2	£80.00	£85.00	01/09/2020	6.3%	EX
		Transport Zone 3	£66.00	£70.00	01/09/2020	6.1%	EX
		Transport Zone 4	£43.00	£45.00	01/09/2020	4.7%	EX
		Adults	£115.00	£118.00	01/09/2020	2.6%	EX
		Curriculum (per hour)	£63.00	£65.00	01/09/2020	3.2%	EX
		workshops	£10.00	£13.00	01/09/2020	30.0%	EX
		summer fun	£115.00	£118.00	01/09/2020	2.6%	EX
Other Charges	Discretionary	launchpad band	£10.00	£13.00	01/09/2020	30.0%	EX
		Key stage 1 festival	£3.00	£4.00	01/09/2020	33.3%	EX
		Primary Pop	£3.00	£4.00	01/09/2020	33.3%	EX
		spotlight talent	£3.00	£4.00	01/09/2020	33.3%	EX
Library Service							
Photocopying	Discretionary	A4 BW& Colour	£0.25	£0.25	01/04/2020	0.0%	SR
		A3 BW & Colour	£0.50	£0.50	01/04/2020	0.0%	SR
		b) minimum charge for postal requests for copies plus cost of prints	£5.20	£5.30	01/04/2020	1.9%	SR
Microform Copying	Discretionary	a) self service copying	£0.80	£0.80	01/04/2020	0.0%	SR
		b) staff service	£1.60	£1.60	01/04/2020	0.0%	SR

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Library Overdue Charges for Static Libraries	Discretionary	- Adults					
		- per day library open during					
		first week (daily rate)	£0.35	£0.35	01/04/2020	0.0%	NB
		- maximum per item	£5.20	£5.30	01/04/2020	2.0%	NB
		-Children					
		- per day library open during					
		first week (daily rate)	£0.06	£0.06	01/04/2020	0.0%	NB
		- maximum per item	£2.40	£2.40	01/04/2020	0.0%	NB
		- Children in public care	Exempt	Exempt	01/04/2020		NB
		- Institutions					
		- per day library open during					
		first week (daily rate)	£0.31	£0.35	01/04/2020	12.9%	NB
		- maximum per item	£5.20	£5.30	01/04/2020	1.9%	NB
Charge for lost/damaged books (Recommended retail price plus processing fee where applicable)		Various	Various	01/04/2020		NB	
Replacement of Library Tickets	Discretionary	per ticket	£3.10	£3.15	01/04/2020	1.6%	NB

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Library Reservation Fees	Discretionary	a) Book / Audio Books Reservations:					
		- Standard charge	£1.25	£1.15	01/04/2020	-8.0%	NB
		- Under 18s (Incl children in public care)	Exempt	Exempt	01/04/2020		
		b) Items supplied from outside Oxfordshire :					
		- Standard charge	£8.50	£9.00	01/04/2020	5.9%	NB
		Items supplied by the British Library and Universities	£17.00	£18.00	01/04/2020	5.9%	NB
		c) Audio Visual Reservations (excluding Audio Books):					
		- Standard charge	£1.25	£1.15	01/04/2020	-8.0%	NB
		- Concessionary rate	£0.65	£0.65	01/04/2020	0.0%	NB
		Audio Visual Hire Charges	Discretionary	a) DVDs (Per Week)			
- Band 1	£1.30			£1.30	01/04/2020	0.0%	NB
- Band 2 NOT IN USE							
- Band 3	£2.60			£2.60	01/04/2020	0.0%	NB
- Band 4	£4.00			£4.00	01/04/2020	0.0%	NB
b) DVDs Late return Charges (Per day Static Library)							
- Band 1 (maximum charge £3.00)	£0.35			£0.35	01/04/2020	0.0%	NB
- Band 2 NOT IN USE							
- Band 3 (maximum charge £6.00)	£0.65			£0.65	01/04/2020	0.0%	NB
- Band 4 (maximum charge £9.00)	£0.95			£0.95	01/04/2020	0.0%	NB
d) Music CD's (per Week)							
- Band 1	£1.30			£1.30	01/04/2020	0.0%	NB
- Band 2 & 3	£2.60			£2.60	01/04/2020	0.0%	NB
e) Music CDs Late return Charges (Per day Static Library)							
- Band 1 (maximum charge £3.00)	£0.35			£0.35	01/04/2020	0.0%	NB
- Band 2 & 3 (maximum charge £6.00)	£0.65			£0.65	01/04/2020	0.0%	NB
g) Audio Books and Language Packs on CD (3 weeks):							
- Band 1	£1.60	£1.60	01/04/2020	0.0%	NB		
- Band 2 & 3	£2.60	£2.60	01/04/2020	0.0%	NB		

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Audio Visual Hire Charges	Discretionary	- Children in care, foster carers and people with reading impairment are exempt	Exempt	Exempt	01/04/2020		
		h) Audio Books & Language Packs Late Return Charges (Per day Static Library)					
		- Band 1 (maximum charge £4.50)	£0.08	£0.10	01/04/2020	25.0%	NB
		- Band 2 & 3 (maximum charge £7.50)	£0.12	£0.15	01/04/2020	25.0%	NB
		j) CD-ROM (per Week)					
		- Band 1	£1.60	£1.65	01/04/2020	3.1%	NB
		k) CD-ROM late return charges					
		Band 1 (per day static library) - maximum charge £3.00	£0.35	£0.40	01/04/2020	14.3%	NB
Charge for lost/damaged AV	Various	Various	01/04/2020		SR		
Vocal/Orchestral Play sets	Discretionary	a) Booking Fee per 4 month loan					
		- Vocal Scores Oxfordshire Borrowers					
		- per score with performance time of 5 minutes or less	£0.75	£0.80	01/04/2020	6.7%	NB
		- per score with performance time of more than 5 minutes	£1.85	£1.90	01/04/2020	2.7%	NB
		- Vocal Scores Non Oxfordshire Borrowers					
		- per score with performance time of 5 minutes or less	£1.45	£1.50	01/04/2020	3.4%	NB
		- per score with performance time of more than 5 minutes	£3.10	£3.20	01/04/2020	3.2%	NB
		- Orchestral Sets Oxfordshire Borrowers	£31.00	£32.00	01/04/2020	3.2%	NB
		- Orchestral Sets Non Oxfordshire Borrowers	£41.00	£42.00	01/04/2020	2.4%	NB
		- Play Sets	£5.50	£5.70	01/04/2020	3.6%	NB
		b) Overdue charge					
		- per week or part week, per loan, vocal or orchestral	£13.40	£13.70	01/04/2020	2.2%	NB
		- per playset, per day library open during first week (daily rate)	£0.50	£0.60	01/04/2020	20.0%	NB
		- maximum per playset	£5.20	£5.30	01/04/2020	2.0%	NB
c) Administration fee for performance sets supplied from outside Oxfordshire.	£7.50	£7.65	01/04/2020	2.0%	NB		

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Internet Service	Discretionary	A4 BW & Colour	£0.25	£0.25	01/04/2020	0.0%	SR
		A3 BW & Colour	£0.50	£0.50	01/04/2020	0.0%	SR
		Sales of memory sticks	£7.00	£7.00	01/04/2020	0.0%	SR
		Sales of headphones	£2.50	£2.55	01/04/2020	2.0%	SR
Hire of Accomodation	Discretionary	Hire of space Half day commercial use	£50.00	£70.00	01/04/2020	40.0%	EX
		Hire of space Full day commercial use	£100.00	£106.00	01/04/2020	6.0%	
		Hire of space Half day community use	£25.00	£28.00	01/04/2020	12.0%	
		Hire of space Full day community use	£50.00	£53.00	01/04/2020	6.0%	EX
Museum Service							
MRC Digital Imaging	Discretionary	Plain paper Digital Prints (pre-existing image)					
		- per copy on A4	£6.20	£6.40	01/04/2020	3.2%	SR
		- per copy on A3	£6.20	£6.40	01/04/2020	3.2%	SR
		Plain paper Digital Prints (created to order)					
		- per copy on A4	£10.30	£10.50	01/04/2020	1.9%	SR
		- per copy on A3	£10.30	£10.50	01/04/2020	1.9%	SR
		Photo paper Digital Prints (pre-existing image)					
		- per copy A4	£10.30	£10.50	01/04/2020	1.9%	SR
		- per copy A3	£10.30	£10.50	01/04/2020	1.9%	SR
		Photo paper Digital Prints (created to order)					
		- per copy on A4 (or smaller)	£14.50	£14.80	01/04/2020	2.1%	SR
		- per copy on A3 paper	£14.50	£14.80	01/04/2020	2.1%	SR
		Electronic files (automated scan, Archive, microform, or delicate sources including pre-existing scans of wills and parish registers)					

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
MRC Digital Imaging	Discretionary	- per sheet scanned	£1.60	£1.60	01/04/2020	0.0%	SR	
		Electronic files (pre-existing image, compressed)						
		- per image 700 pixels	£1.60	£1.60	01/04/2020	0.0%	SR	
		Electronic files (pre-existing image, compressed)						
		- per image 2250 pixels	£6.20	£6.40	01/04/2020	3.2%	SR	
		Electronic files (pre-existing image, uncompressed)						
		- per image 3200 pixels and above	£10.30	£10.50	01/04/2020	1.9%	SR	
		Electronic files (created to order, compressed)						
		- per image 2500 pixels	£10.30	£10.50	01/04/2020	1.9%	SR	
		Electronic files (created to order, uncompressed)						
		- per image 3200 pixels and above	£14.50	£14.80	01/04/2020	2.1%	SR	
		Other						
		- Use of Digital Camera/USB Memory Stick per day	£7.00	£7.00	01/04/2020	0.0%	SR	
		- Use of Digital Camera/USB Memory Stick per week	£20.00	£20.00	01/04/2020	0.0%	SR	
		Transfer to CD-R	£6.00	£6.00	01/04/2020	0.0%	SR	
		Publication Commercial						
		- Per image	£45.00	£45	01/04/2020	0.0%	SR	
- Per extra instance of an image	£19.00	£19.	01/04/2020	0.0%	SR			
Internal Use Commercial								
-For use within organisation	£25.00	£26.00	01/04/2020	4.0%	SR			
MRC Reproduction Fees	Discretionary	One programme, unlimited transmissions, one country (EU = one country) - per image used, 0-6 years	£75.00	£77	01/04/2020	2.7%	SR	
		One programme, unlimited transmissions, one country (EU = one country) - per image used, in perpetuity	£125.00	£128	01/04/2020	2.4%	SR	

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
MRC Reproduction Fees	Discretionary	One programme, unlimited transmissions, worldwide - per image used, 0-6 years	£190.00	£194	01/04/2020	2.1%	SR	
		One programme, unlimited transmissions, worldwide - per image used, in perpetuity	£310.00	£317	01/04/2020	2.3%	SR	
		Publication: academic						
		- Per image used (1st image)	£14.50	£14.80	01/04/2020	2.1%	SR	
		- Per image used (2 images)	£10.88	£11.10	01/04/2020	2.1%	SR	
		- Per image used (3 images)	£9.72	£9.90	01/04/2020	1.9%	SR	
		- Per image used (4 images)	£8.99	£9.20	01/04/2020	2.3%	SR	
		- Per image used (5 images)	£8.70	£8.90	01/04/2020	2.3%	SR	
		- Per image used (6-10 images)	£7.98	£8.20	01/04/2020	2.8%	SR	
		- Per image used (11-15 images)	£6.82	£7.00	01/04/2020	2.7%	SR	
		- Per image used (16-20 images)	£6.09	£6.25	01/04/2020	2.6%	SR	
		- Per image used (21-40 images)	£3.77	£3.90	01/04/2020	3.4%	SR	
		- Per image used (41-60 images)	£3.05	£3.10	01/04/2020	1.8%	SR	
		- Per image used (61 or more images)	£2.61	£2.70	01/04/2020	3.4%	SR	
		Publication: local individuals, organisations and partners						
- Per use of one or more images	£20.00	£20	01/04/2020	0.0%	SR			
Hire of Accommodation	Discretionary	Location fee for use of Oxfordshire Museum/Museums Resource Centre or Swalcliffe Barn premises for film / TV / broadcast purposes per hour or part hour	£60.00	£62.00	01/04/2020	3.3%	EX	
		a) Oxfordshire Museum						
		- Exhibition Gallery						
		- per week	£205.00	£210.00	01/04/2020	2.4%	EX	
		b) Brewhouse						
		- Exhibition Gallery						
		- per month	£267.00	£273.00	01/04/2020	2.2%	EX	
		- 1/2 day Community Use	£27.00	£28.00	01/04/2020	3.7%	EX	
		- 1/2 day Commercial Use	£68.00	£70.00	01/04/2020	2.9%	EX	
		- per day - Community Use	£52.00	£53.00	01/04/2020	1.9%	EX	
		- per day - Commercial Use	£104.00	£106.00	01/04/2020	1.9%	EX	

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Hire of Accommodation	Discretionary	c) Coachhouse						
		- 1/2 day Community Use	£38.00	£39.00	01/04/2020	2.6%	EX	
		- 1/2 day Commercial Use	£81.00	£83.00	01/04/2020	2.5%	EX	
		- per day - Community Use	£64.00	£65.00	01/04/2020	1.6%	EX	
		- per day - Commercial Use	£143.00	£146.00	01/04/2020	2.1%	EX	
		d) MRC Education Lecture Room						
		- 1/2 day Community Use	£27.00	£28.00	01/04/2020	3.7%	EX	
		- per day - Community Use	£54.00	£55.00	01/04/2020	1.9%	EX	
		e) Provision of staff to support activities of hirer per hour						
		- during Museum open hours	£22.00	£22.50	01/04/2020	2.27%	SR	
		- out of Museum open hours	£34.00	£35.00	01/04/2020	2.9%	SR	
		f)Coach House charge for use outside normal hours plus staffing as necessary						
		Education use up to 3 hours	£50.00	£52.00	01/04/2020	4.0%	EX	
Commercial use up to 3 hours	£75.00	£77.00	01/04/2020	2.7%	EX			
Conservation & Exhibition Services	Discretionary	a) MRC						
		Remedial conservation - per hour	£62.00	£63.50	01/04/2020	2.4%	SR	
		c) Specialist Climate Controlled Collections Storage and Care per year						
		-Small Item (c.10x10x10cm)	£123.00	£126.00	01/04/2020	2.4%	SR	
		-Medium Item (c 20x20xx20cm)	£246.00	£251.00	01/04/2020	2.0%	SR	
		-Large Item (c.0.5 cubic meters)	£430.00	£440.00	01/04/2020	2.3%	SR	
		d) General Collections storage and Care per year						
		-Large Item	£492.00	£502.00	01/04/2020	2.0%	SR	
		e) Environmental Monitoring (per month)						
		- for 3 thermohygrographs	£57.00	£59.00	01/04/2020	3.5%	SR	
		Loan of datalogger and printout per period up to 2 months	£57.00	£59.00	01/04/2020	3.5%	SR	
		Environmental summary						
		f) Conservation Advice per hour	£57.00	£59.00	01/04/2020	3.5%	SR	
- per day	£461.00	£471.00	01/04/2020	2.2%	SR			
- per half-day	£231.00	£236.00	01/04/2020	2.2%	SR			

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Conservation & Exhibition Services	Discretionary	g) Museum Pest Management plus materials						
		- per day	£461.00	£471.00	01/04/2020	2.2%	SR	
		- per half day	£231.00	£236.00	01/04/2020	2.2%	SR	
		- per hour	£57.00	£59.00	01/04/2020	3.5%	SR	
		h) Hire of display equipment						
		Cases						
		- per day	£20.00	£21.00	01/04/2020	5.0%	SR	
		- per week	£100.00	£102.00	01/04/2020	2.0%	SR	
		- per month	£220.00	£225.00	01/04/2020	2.3%	SR	
		i) Training						
		- per day	£461.00	£471.00	01/04/2020	2.2%	SR	
		- per half day	£231.00	£236.00	01/04/2020	2.2%	SR	
		k) Documentation and storage of archaeological archives						
- site archive up to 3 archaeological storage boxes ((0.022m3)	£103.00	£105.00	01/04/2020	1.9%	SR			
-per archaeological storage box (0.022m3)	£67.00	£68.50	01/04/2020	2.2%	SR			
Museums Service Research Enquiries	Discretionary	- written reply to each enquiry per hour (or pro-rata) Minimum 30 minutes £20, Maximum 2 hours £80.	£40.00	£41.00	01/04/2020	2.5%	SR	
		- higher rate for businesses and profit-making organisations						
		per hour (or pro-rata) Minimum 30 minutes £26. Maximum 2 hours £120.	£60.00	£62.00	01/04/2020	3.3%	SR	
Microform Copying	Discretionary	Copying by Staff						
		- per A4 copy	£1.60	£1.60	01/04/2020	0.0%	SR	
		- per A3 copy	£1.60	£1.60	01/04/2020	0.0%	SR	
Administrative Charge	Discretionary	Minimum charge for providing an invoice for any service	£30.00	£30.00	01/04/2020	0.0%	SR	
MRC Photographic	Discretionary	Photographic Prints by External Photographer					SR	
Postage & Packing	Discretionary	- Reinforced Envelope in reinforced C4 envelope	£3.00	£3.00	01/04/2020	0.0%	SR	
		Cardboard Tube - Copies supplied in 450mm cardboard tube	£6.00	£6.00	01/04/2020	0.0%	SR	
		Disc Mailer - CR-ROM supplied in disc mailer	£6.00	£6.00	01/04/2020	0.0%	SR	
		Air Mail - additional to basic cost	£3.00	£3.00	01/04/2020	0.0%	SR	
Oxfordshire Museum Lecture Fees plus travel at current OCC rates	Discretionary	Per event	£65.00	£66.00	01/04/2020	1.5%	SR	

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Use of Oxfordshire Museum Garden for Wedding Photography	Discretionary	Per event	£91.00	£95.00	01/04/2020	4.4%	EX	
Learning & Access	Discretionary	School Sessions at The Oxfordshire Museum - up to 30 children	£80.00	£85.00	01/04/2020	6.3%	NB	
		Outreach School Sessions KS1 (approximately 1.25 hours)						
		- up to 30 children	£95.00	£99.00	01/04/2020	4.2%	NB	
		Outreach School Sessions KS2 (approximately 1.5 hours)						
		- up to 30 children	£115.00	£120.00	01/04/2020	4.3%	NB	
		School Box Loans						
		- per term	£33.00	£35.00	01/04/2020	6.1%	NB	
		Reminiscence Box Loans						
		- per 2 week loan	£22.00	£24.00	01/04/2020	9.1%	NB	
		Reminiscence sessions						
		- Maximum 15 participants	£22.00	£24.00	01/04/2020	9.1%	NB	
		Facilitated Community Group Visits to The Oxfordshire Museum						
		- per group during normal opening (approximately 2.5 hours)	£26.00	£27.00	01/04/2020	3.8%	NB	
		Family Learning Drop In at The Oxfordshire Museum						
- per child	£2.00	£2.00	01/04/2020	0.0%	NB			
- per family of up to 3 children	£5.00	£5.00	01/04/2020	0.0%	NB			

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
History Service							
Digital Imaging	Discretionary	Plain paper Digital Prints (pre-existing image)					
		- per copy on A4	£6.20	£6.40	01/04/2020	3.2%	SR
		- per copy on A3	£6.20	£6.40	01/04/2020	3.2%	SR
		Plain paper Digital Prints (created to order)					
		- per copy on A4	£10.30	£10.50	01/04/2020	1.9%	SR
		- per copy on A3	£10.30	£10.50	01/04/2020	1.9%	SR
		Photo paper Digital Prints (pre-existing image)					
		- per copy A4	£10.30	£10.50	01/04/2020	1.9%	SR
		- per copy A3	£10.30	£10.50	01/04/2020	1.9%	SR
		Photo paper Digital Prints (created to order)					
		- per copy on A4 (or smaller)	£14.50	£14.80	01/04/2020	2.1%	SR
		- per copy on A3 paper	£14.50	£14.80	01/04/2020	2.1%	SR
		Electronic files (automated scan of Archive, microform, or delicate sources)					
		- per sheet scanned	£1.60	£1.60	01/04/2020	0.0%	SR
		Electronic files (pre-existing digital image, excluding Picture Oxon images and hi-res tithe map images)					
		- per image or per page as appropriate	£0.80	£0.80	01/04/2020	0.0%	SR
		Electronic files (automated scan, Local Studies sources)					
		- per sheet scanned	£0.80	£0.80	01/04/2020	0.0%	SR
		Electronic files (pre-existing image, compressed)					
		- per image 700 pixels	£1.60	£1.60	01/04/2020	0.0%	SR

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Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Digital Imaging	Discretionary	Electronic files (pre-existing image, compressed)						
		- per image 2250 pixels	£6.20	£6.40	01/04/2020	3.2%	SR	
		Electronic files (pre-existing image, uncompressed)						
		- per image 3200 pixels and above	£10.30	£10.50	01/04/2020	1.9%	SR	
		Electronic files (created to order, compressed)						
		- per image 2500 pixels	£10.30	£10.50	01/04/2020	1.9%	SR	
		Electronic files (created to order, uncompressed)						
		- per image 3200 pixels and above	£14.50	£14.80	01/04/2020	2.1%	SR	
		Electronic files (digitised Tithe Maps)						
		- per image	£14.50	£14.80	01/04/2020	2.1%	SR	
		Other						
		- Digital copying permit (per day)	£7.00	£7.00	01/04/2020	0.0%	SR	
		- Digital copying permit (per week)	£20.00	£20.00	01/04/2020	0.0%	SR	
Transfer to CD-R	£6.00	£6.00	01/04/2020	0.0%	SR			
Reproduction Fees	Discretionary	Publication Commercial						
		- Per image	£44.00	£45.00	01/04/2020	2.3%	SR	
		- Per extra instance of an image	£19.00	£19.00	01/04/2020	0.0%	SR	
		Internal Use Commercial						
		-For use within organisation	£25.00	£26.00	01/04/2020	4.0%	SR	
		-Use on a website (per year) - per image	£60.00	£62.00	01/04/2020	3.3%	SR	
Broadcast Media (multi-platform, including streaming and online catchup servers)								

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class	
Reproduction Fees	Discretionary	One programme, unlimited transmissions, one country (EU = one country) - per image used, 0-6 years	£75.00	£77.00	01/04/2020	2.7%	SR	
		One programme, unlimited transmissions, one country (EU = one country) - per image used, in perpetuity	£125.00	£128.00	01/04/2020	2.4%	SR	
		One programme, unlimited transmissions, worldwide - per image used, 0-6 years	£190.00	£194.00	01/04/2020	2.1%	SR	
		One programme, unlimited transmissions, worldwide - per image used, in perpetuity	£310.00	£317.00	01/04/2020	2.3%	SR	
		Publication: academic						
		- Per image used (1st image)	£14.50	£14.80	01/04/2020	2.1%	SR	
		- Per image used (2 images)	£10.88	£11.10	01/04/2020	2.1%	SR	
		- Per image used (3 images)	£9.72	£9.90	01/04/2020	1.9%	SR	
		- Per image used (4 images)	£8.99	£9.20	01/04/2020	2.3%	SR	
		- Per image used (5 images)	£8.70	£8.90	01/04/2020	2.3%	SR	
		- Per image used (6-10 images)	£7.98	£8.20	01/04/2020	2.8%	SR	
		- Per image used (11-15 images)	£6.82	£7.00	01/04/2020	2.7%	SR	
		- Per image used (16-20 images)	£6.09	£6.25	01/04/2020	2.6%	SR	
		- Per image used (21-40 images)	£3.77	£3.90	01/04/2020	3.4%	SR	
		- Per image used (41-60 images)	£3.05	£3.10	01/04/2020	1.8%	SR	
		- Per image used (61 or more images)	£2.61	£2.70	01/04/2020	3.4%	SR	
		Publication: local individuals, organisations and partners						
		- Per use of one or more images	£20.00	£20.00	01/04/2020	0.0%	SR	
		OHC USE OF PREMISES						
		Location fee for use of Oxfordshire History Centre premises for film / TV / broadcast purposes - per hour or part hour			£60.00	£62.00	01/04/2020	3.3%

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Research Enquiries	Discretionary	- written reply to each enquiry per hour (or pro-rata) Minimum 30 minutes £20, Maximum 2 hours £80.	£40.00	£40.00	01/04/2020	0.0%	SR
		- higher rate for businesses and profit-making organisations per hour (or pro-rata) Minimum 30 minutes £30. Maximum 2 hours £120.	£60.00	£65.00	01/04/2020	8.3%	SR
Microform Copying	Discretionary	a) Self Service Copying					
		- per A4 copy	£0.80	£0.80	01/04/2020	0.0%	SR
		- per A3 copy	£0.80	£0.80	01/04/2020	0.0%	SR
		b) Copying by Staff					
		- per A4 copy	£1.60	£1.60	01/04/2020	0.0%	SR
		- per A3 copy	£1.60	£1.60	01/04/2020	0.0%	SR
Photocopies	Discretionary	Self Service Copying -					
		- per A4 copy	£0.25	£0.25	01/04/2020	0.0%	SR
		- per A3 copy	£0.50	£0.50	01/04/2020	0.0%	SR
		Local Studies -					
		Staff Operated Copying -					
		- per A4 copy	£0.80	£0.80	01/04/2020	0.0%	SR
		- per A3 copy	£0.80	£0.80	01/04/2020	0.0%	SR
		All Archive Documents and Delicate					
		- per A4 or A3 copy (ordered on-site)	£1.30	£1.30	01/04/2020	0.0%	SR
- per A4 or A3 copy (ordered remotely)	£1.60	£1.60	01/04/2020	0.0%	SR		
Computer Printouts	Discretionary	Self Service Copying -					
		- per A4 copy	£0.25	£0.25	01/04/2020	0.0%	SR
		- per A3 copy	£0.50	£0.50	01/04/2020	0.0%	SR
		Staff Operated Copying -					
		- per A4 copy	£0.80	£0.80	01/04/2020	0.0%	SR
		- per A3 copy	£0.80	£0.80	01/04/2020	0.0%	SR

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Certificates	Discretionary	Per Copy -					
		Electoral register search certified letter		£12.00	01/04/2020	#DIV/0!	SR
		Motor Vehicle Registration copies	£12.00	£12.00	01/04/2020	0.0%	SR
		Baptism Certificates	£14.00	£14.00	01/04/2020	0.0%	NB
		Marriage Certificates	£10.00	£11.00	01/04/2020	10.0%	NB
Copies of Recordings	Discretionary	From Oral History (per CD)	£18.00	£18.00	01/04/2020	0.0%	SR
		From Oral History (per DVD)	£35.00	£35.00	01/04/2020	0.0%	SR
Minimum Charge	Discretionary	Minimum charge for providing copies	£5.20	£5.30	01/04/2020	2.0%	SR
Administrative Charge		Minimum charge for providing an invoice for	£30.00	£30.00	01/04/2020	0.0%	SR
Postage & Packing	Discretionary	- Reinforced Envelope in reinforced C4 envelope	£3.00	£3.00	01/04/2020	0.0%	SR
		Cardboard Tube - Copies supplied in 450mm cardboard tube	£6.00	£6.00	01/04/2020	0.0%	SR
		Disc Mailer - CR-ROM supplied in disc mailer	£6.00	£6.00	01/04/2020	0.0%	SR
		Air Mail - additional to basic cost	£3.00	£3.00	01/04/2020	0.0%	SR
Oxfordshire History Service Lecture Fees plus travel at current OCC rates	Discretionary	Per event	£70.00	£70.00	01/04/2020	0.0%	SR
USB memory sticks	Discretionary	per 4Bb-8Gb stick	£7.00	£7.00	01/04/2020	0.0%	SR

Review of Charges 2020/21 - Communities

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Coroners' Service							
Coroners Fees for disclosure after inquest	Statutory	Document disclosed by a coroner as a paper copy:					
		- document of 10 pages or less	£5.00	£5.00	01/04/2020	0.0%	
		- additional charge for each subsequent page	£0.50	£0.50	01/04/2020	0.0%	
		Document disclosed in any other medium, other than by email or as a paper copy - fee per document	£5.00	£5.00	01/04/2020	0.0%	
		Administrative fee for providing a copy of a recording (per CD or memory stick)	£5.00	£5.00	01/04/2020	0.0%	
		No fee shall be payable where a document is disclosed by email by a coroner to an interested person	£0.00	£0.00	01/04/2020	#DIV/0!	
		Transcription of an inquest hearing:					
		- copy consisting of 360 words or less	£6.20	£6.20	01/04/2020	0.0%	
		- copy consisting of between 361 words and up to and including 1,439 words	£13.10	£13.10	01/04/2020	0.0%	
		- copy consisting of between 1,440 words or more - first 1,440 words	£13.10	£13.10	01/04/2020	0.0%	
- copy consisting of between 1,440 words or more - each additional 72 words or part thereof	£0.70	£0.70	01/04/2020	0.0%			
Innovation Hub - Other							
Charging for work of officers in innovation & research projects to other organisations.	Discretionary	Group Manager day rate		£594.00	01/04/2020	n/a	SR
		Team Leader day rate		£461.00	01/04/2020	n/a	SR
		Lead Area Specialist day rate		£420.00	01/04/2020	n/a	SR
		Support Officer		£390.00	01/04/2020	n/a	SR

Review of Charges 2020/21 - Children's Services

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Corporate Parenting - Riverside Centre							
Climbing wall (tower) hire for one day within Oxfordshire	Discretionary		£750.00	£780.00	01/04/2020	4.0%	SR
Recharge rate for SEND & Meadowbrook Schools			£22.50	£25.00	01/04/2020	11.1%	SR
First Staff member per half day (up to 3.5 hours).			£215.00	£230.00	01/04/2020	7.0%	SR
Second staff member per half day			£155.00	£170.00	01/04/2020	9.7%	SR
First Staff member per whole day (3.5hrs- 7hrs)			£286.00	£300.00	01/04/2020	4.9%	SR
Second Staff member per whole day			£227.00	£240.00	01/04/2020	5.7%	SR
Minibus hire to OCC approved groups			£77.50	£85.00	01/04/2020	9.7%	SR
Minibus per mile after first 100 miles per day			£0.18	£0.25	01/04/2020	38.9%	
Hire of Premises (cost of the building per day)			£65.00	£70.00	01/04/2020	7.7%	SR
Corporate Parenting - ATTACH							
Assessment	Discretionary	Per Hour	£125.00	£125.00	01/04/2020	0.0%	
Telephone Appointment		Per Half Hour	£60.00	£60.00	01/04/2020	0.0%	
Nurturing Attachments Group		Per Intervention	£1,250.00	£1,250.00	01/04/2020	0.0%	
Non-Violent Resistance Group		Per Intervention	£1,000.00	£1,000.00	01/04/2020	0.0%	
VIG		Per Intervention	£1,250.00	£1,250.00	01/04/2020	0.0%	
Stories for Attachment Group		Per Intervention	£500.00	£500.00	01/04/2020	0.0%	
Foundations for Attachment Group		Per Intervention	£800.00	£800.00	01/04/2020	0.0%	
Therapy		Per Hour	£125.00	£125.00	01/04/2020	0.0%	
Additional Hours		Per Hour	£62.50	£62.50	01/04/2020	0.0%	
Home to School Transport							
Contributions To School Transport (Per annum)	Discretionary	Under 3 Miles Pre & Post-16 Students	£370.64	£378.00	01/09/2020	2.0%	ZR
		Over 3 Miles Pre &	£690.72	£705.00	01/09/2020	2.1%	ZR

Review of Charges 2020/21 - Adult Services

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Urgent Response and Telecare Service: telecare equipment and monitoring form a call centre.							
URTS service - telecare level 1	Non- Statutory	Weekly	£5.00	£5.00	01/04/2020	0.0%	ZR or SR
URTS service - telecare level 2	Non- Statutory	Weekly	£10.00	£10.00	01/04/2020	0.0%	ZR or SR
Arrangement fees							
Annual charge for arranging homecare support for people who fund their own care	Non-statutory		£140.00	£145.00	01/04/2020	3.6%	
Annual charges for manging non-residential care for people who fund their own care	Non-statutory		£260.00	£265.00	01/04/2020	1.9%	
Daytime Support							
Service User Transport (single or return journey) where this is part of assessed need	Statutory	Single or Return Journey	£20.00	£20.00	01/04/2020	0.0%	NB
1:6 Respite & prevention (3 hour session)	Statutory	3 hour Session	£19.00	£21.00	01/04/2020	10.5%	NB
1:2 Active Support (3 hour session)	Statutory	3 hour Session	£28.00	£30.00	01/04/2020	7.1%	NB
1:1 Support (3 hour session)	Statutory	3 hour Session	£62.00	£64.00	01/04/2020	3.2%	NB
2:1 Support (3 hour session)	Statutory	3 hour Session	£112.00	£114.00	01/04/2020	1.8%	NB
Hourly cost of attendance outside of core hours	Statutory	per hour	£21.00	£23.00	01/04/2020	9.5%	NB
Lunchtime meal	Statutory	per meal	£2.08	£2.29	01/04/2020	10.0%	SR
Hire of Sensory Room	Statutory	per hour	£3.07	£3.38	01/04/2020	10.0%	NB or SR
Hire of Room (no equipment provided)	Statutory	per hour	£16.00	£20.00	01/04/2020	25.0%	ZR
Music, Art and Boom Groups	Statutory	per session	£5.00	£5.50	01/04/2020	10.0%	NB or SR
SMILE	Statutory	per session	£5.00	£5.50	01/04/2020	10.0%	NB or SR

Review of Charges 2020/21 - Adult Services

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Money Management							
Court of Protection income	Statutory	Category 1:					
		Work up to court order	£745.00	£745.00	01/04/2020	0.0%	NB
		Category 2 Property &					
		Annual Management Fee	£775.00	£775.00	01/04/2020	0.0%	NB
		Yr2 & subsequent yrs	£650.00	£650.00	01/04/2020	0.0%	NB
		or max 3.5% of net assets if less than £16,000					
		Deputy for Health &	£555.00	£555.00	01/04/2020	0.0%	NB
		Category 3 Property	£300.00	£300.00	01/04/2020	0.0%	NB
		Category 4 Annual report	£216.00	£216.00	01/04/2020	0.0%	NB
		Category 5 Preparing Tax					
		Preparation of basic HMRC income tax return	£70.00	£70.00	01/04/2020	0.0%	NB
		Preparation of complex HMRC income tax return	£140.00	£140.00	01/04/2020	0.0%	NB
		Section 12, Fixed cost direction of travel	£40.00	£40.00	01/04/2020	0.0%	NB
Charge per hour for work in relation to estates of deceased clients	Discretionary	per hour	£105.00	£115.00	01/04/2020	9.5%	SR
County Print Finishers							
County Print Finishers is a Supported Business, operated by the council's employment service, Oxfordshire Employment. The primary function of a supported business is to support those with a disability (as defined in The Equality Act 2010) or health barrier preventing them securing employment. County Print Finishers provides a range of work and work preparation services through the provision of print, data destruction and packaging services. These services are provided to the public on a cost recovery basis, using print-industry pricing software ensuring that the council's costs are recovered from all work undertaken.							
Other Adult Social Care Services are governed by the Care and Support Statutory Guidance issued under the Care Act 2014 and the Council's Adult Social https://www.oxfordshire.gov.uk/residents/social-and-health-care/adult-social-care/legal-and-money-issues/paying-care/services-we-charge							

Review of Charges 2020/21 - Customers and Organisational Development

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Customer Service Centre							
Concessionary Fares	Discretionary	Card issue and admin	£10.00	£10.00	01/04/2020	0.0%	NB
Disabled Parking	Discretionary	Card issue and admin, assessment service	£10.00	£10.00	01/04/2020	0.0%	NB
Human Resources							
Job Evaluations for Academies	Discretionary	Ad-Hoc/ Re-evaluation of a Role per role	£100.00	£164.00	01/04/2020	64.0%	SR
		Rate per hour if it takes more than 25 hours per role	£150.00	£246.00	01/04/2020	64.0%	SR

Review of Charges 2020/21 - Commercial Development, Assets and Investment

Charge	Discretionary or Statutory	Unit	Current Charge	Proposed Charge	Proposed date effective from	Change %	VAT Class
Legal Services							
Section 106 and other Charges (OUTS)	Statutory & Discretionary	Hour	£190.00	£195.00	01/04/2020	2.6%	SR
Legal Hub (OUTS)	Discretionary	Hour	£100.00	£100.00	01/04/2020	0.0%	SR
Legal Hub (OUTS) - apprentices	Discretionary	Hour	£85.00	£85.00	01/04/2020	0.0%	SR
West Berks/Probation, Thames, Henley TC	Discretionary	Hour	£95.00	£95.00	01/04/2020	0.0%	SR
Academies	Discretionary	Hour	£150.00	£153.00	01/04/2020	2.0%	SR
Schools	Discretionary	Hour	£90.00	£90.00	01/04/2020	0.0%	SR
Town Councils	Discretionary	Hour	£95.00	£95.00	01/04/2020	0.0%	SR
Litigation costs	Discretionary	Hour	£0.00	£195.00	01/04/2020	n/a	SR
Educational Appeals							
Academies - Admissions - Lodged	Discretionary	per appeal	£20	£20	01/04/2020	0.0%	SR
Academies - Admissions - Lodged & Listed	Discretionary	per appeal	£100	£100	01/04/2020	0.0%	SR
Academies -Admissions- Full Service including Clerking	Discretionary	For each appeal per day	£189	£196	01/04/2020	3.7%	SR
Academies - Exclusions	Discretionary	Per exclusion up to 25 hours	£1,243	£1,268	01/04/2020	2.0%	SR
		Per hour if exceeds 25 hours	£39	£40	01/04/2020	2.6%	SR
Governance							
Councillor Complaints - South Northants	Discretionary	per hour	£100	£100	01/04/2020	0.0%	SR
Information Management							
Information advice	Discretionary	per hour		£50	01/04/2020		SR
Risk Assessments	Discretionary	Per assessment (est 10hrs)		£500	01/04/2020		SR
Information Sharing Agreement	Discretionary	Per assessment (est 15hrs)		£750	01/04/2020		SR

Cross-Cutting Service and Community Impact Assessment (SCIA)

Medium Term Financial Plan 2020/21-2023/23

Context

Oxfordshire County Council has delivered significant savings over the last decade, both as part of our role in bringing down the public sector deficit through reduced government funding, and in order to reinvest in meeting demand growth and funding priorities.

The County Council's budget is designed to enable us to meet our key priorities for a Thriving Oxfordshire – thriving people, thriving communities, and a thriving economy. This is achieved through priority-based budget setting and listening to residents so that we can continuously improve our services and provide value for money.

Meeting the rising demand of caring for older people, adults with disabilities and keeping children safe remain key priorities.

To meet these pressures, we need to work more efficiently, redesign our services delivery to reflect the changing needs of our communities and maximise our income and investment opportunities.

Service and Community Impact Assessments

At each annual budget, and when major changes are proposed outside of the budget setting process, Service and Community Impact Assessments (SCIAs) enable us to review the potential impact of new and updated policies and service delivery decisions on specific individuals, communities, partner organisations and providers.

A SCIA does not guarantee that a change will never have a negative impact but it is intended to ensure policies meet the diverse needs of individuals. SCIAs also ensure that the outcomes of a proposal are considered, with the potential benefits maximised and possible challenges mitigated, to the extent possible within the overall funding available.

We publish the SCIAs produced every year during the budget setting process, in addition to completing an overarching SCIA drawing together the information from across the budget into a coherent high-level assessment.

In considering the impact of budget proposals before they are formally agreed, the Council undertakes a detailed process of democratic and community engagement. This includes:

- Using the Oxfordshire Joint Strategic Needs Assessment of health and wellbeing needs, and the associated Equalities Briefing, to consider the impact of proposals as they are drawn up, as SCIAs for each proposal are developed, and as the cross-cutting SCIA is prepared. The Council's

JSNA can be found here: <http://insight.oxfordshire.gov.uk/cms/joint-strategic-needs-assessment>

- A democratic process including agreement of proposals by Cabinet, analysis and comment on those proposals by Performance Scrutiny, and adoption of a budget by Full Council, at each of which the public, and representatives of particular organisations or population groups, are entitled to request to speak, in order

Individual SCIA's are produced for each proposal to ensure the appropriate level of detailed analysis is completed and action taken where identified to mitigate any potential negative impacts and maximise potential benefits and so that all decisions are taken with full understanding of their potential implications.

Equalities

Section 149 of the Equalities Act 2010 ("the 2010 Act") imposes a duty on the Council to give due regard to three needs in exercising its functions. This proposal is such a function. The three needs are:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic, and those who do not.

Complying with section 149 may involve treating some people more favourably than others, but only to the extent that that does not amount to conduct which is otherwise unlawful under the new Act.

The need to advance equality of opportunity involves having due regard to the need to:

- remove or minimise disadvantages which are connected to a relevant protected characteristic and which are suffered by persons who share that characteristic,
- take steps to meet the needs of persons who share a relevant protected characteristic and which are different from the needs other people, and
- encourage those who share a relevant characteristic to take part in public life or in any other activity in which participation by such people is disproportionately low.
- take steps to meet the needs of disabled people which are different from the needs of people who are not disabled and include steps to take account of a person's disabilities.

The need to foster good relations between different groups involves having due regard to the need to tackle prejudice and promote understanding.

These protected characteristics are:

- age
- disability

- gender reassignment
- pregnancy and maternity
- race – this includes ethnic or national origins, colour or nationality
- religion or belief – this includes lack of belief
- sex
- sexual orientation
- marriage and civil partnership

Assessing Service and Resource Planning Proposals:

Potential Impact on Individuals and Communities:

- **Age**

Oxfordshire's population during the last JSNA assessment in March 2019 was estimated to be 682,400. The 85+ population is predicted to increase by 63% (10,900) by 2032.

The proposal to reduce care home placements by 1% (approximately 7-8 placements) is more likely to impact on older people. Our overarching aim is to ensure that people are supported to live in their own homes as independently as possible for as long as possible. In order to mitigate the loss of care home placement packages, better support will be provided to enable people to stay in their own homes which is in line with the wishes of older people who were consulted as part of developing our Older People's Strategy.

For younger people, the JSNA highlights that Oxfordshire has a higher than average rate of people aged 0-4 and 20-24 but this includes students attending the universities.

The proposal to reduce floating support for people at risk of homelessness by up to 5% may result in greater pressure on adult and young people's homelessness pathway services and may have an adverse effect on families, particularly children who may need to move or miss education if at risk of homelessness. Further work will be required to fully understand the potential impact of this and develop appropriate mitigating actions, working closely with Children and Family Services, providers, and service users. A full impact assessment will be developed alongside the proposal itself.

The proposal to increase self-testing services for sexually transmitted infections (STIs) and HIV as part of the Integrated Sexual Health Service (ISHS) may impact more positively on younger people. The proposal involves users accessing self-sampling testing kits through the post rather than needed to attend a sexual health clinic for a face-to-face appointment. Intelligence gathered from service users as part of moving to the tariff-based system suggested that an online service may appeal more to those aged under 25 than those aged 35+. In order to appeal to all age groups, face-to-face appointments will still be offered alongside the promotion of the digital service.

- **Disability**

The JSNA highlights that around 16% of the South East population has a known disability which would equate to around 129,700 people in Oxfordshire.

Proposals to reduce care home placements by 1% will be offset by facilitating people to live independently in their own homes for as long as possible and this would include those living with long-term health conditions and disabilities.

The Learning Disability outreach service currently supports 51 adults with a learning disability. The proposal will see services purchased by individuals through their personal budgets when the contract comes to an end. To mitigate the effects of this change, the Council is currently developing its strength-based approach to community services which will focus on prevention and may result in lower demand for the service. For individuals affected by the change, the Council will work with providers to understand how provision can be prioritised and delivered. A full impact assessment will be developed alongside the proposal itself to consider the potential impact and mitigating actions. The Council will ensure it continues to comply with its statutory duties under the Care Act and meet the care needs of people who are eligible.

In Oxfordshire, whilst levels of smoking are generally relatively lower, it is noticeably higher for those with a serious mental illness (36.4% locally, compared to 38.5% regionally and 40.5% nationally) and 22.7% of those living with a long-term mental health condition are likely to be smokers. These groups will continue to be a priority area for advice and support.

- **Gender reassignment**

No specific issues relating to gender reassignment have been assessed as likely to be impacted as a result of this budget round. The Integrated Sexual Health Service (ISHS) already provides services for those who have undergone gender reassignment and will continue to do so.

- **Pregnancy and maternity**

Whilst smoking levels in the County are relatively low at 10.4%, the proportion of women who smoke whilst they are pregnant is 7.5% in the County compared to 9.7% regionally and 10% nationally. The proposal to move from a universal smoking cessation service towards a targeted service that focuses on tobacco control will therefore continue to have pregnant women and young mothers who smoke as a high priority area for targeted support. Further engagement will take place with smokers and non-smokers as part of a wider needs assessment for the service.

- **Race – this includes ethnic or national origins, colour or nationality**

In 2011 107,000 people in Oxfordshire were of an ethnic minority background which was an increase of 60,900 from 2001. The JSNA highlights that around 16% of the county's population is from an ethnic minority background.

The floating support service that aims to prevent people being made homeless is often used by Black and Ethnic Minority communities, particularly Asian women and non-white British people. Proposed reductions in the service may be more likely to affect these groups. To mitigate this, service providers will be encouraged to collaborate and share expertise to ensure that services are sensitive to cultural needs and individuals are able to access appropriate support. A full impact assessment will be developed alongside the proposal, including engagement with current providers and service users, to inform further mitigating actions where appropriate.

- **Religion or belief – this includes lack of belief**

No specific issues relating to religion or belief have been assessed as likely to be impacted as a result of this budget round.

- **Sex**

Asian women are a more common user of the homeless prevention floating support service, it is our intention that we encourage service providers to work together and share good practice to be aware of cultural sensitivities and to ensure that this group continues to receive the support that they need.

- **Sexual orientation**

Our sexual health screening services actively encourage men who have sex with men to get regular tests as this group is at higher risk of STIs and HIV, the proposed budget changes will not affect promotion to this group.

- **Marriage and civil partnership**

No specific issues relating to marriage and civil partnership have been assessed as likely to be impacted as a result of this budget round.

- **Rural communities**

Oxfordshire is the most rural county in the South East and the majority of residents are concentrated in Oxford city centre. Rural districts have a much higher proportion of older people. In 2017 the older population made up around 20% of people living in rural areas compared to 12% in the city centre this means that our proposal to reduce care home placements by 1% may be more likely to affect people living in rural areas if they are older.

The proposal to increase the availability of online/self-testing STI screening may be a benefit to people living in rural areas as they would otherwise need to travel to attend a face-to-face appointment.

The proposal to remove the Oxfordshire Fire and Rescue Resilience Pump may result in reduced operational cover in more rural communities which otherwise rely on on-call Firefighters to provide emergency response. In order to mitigate against this, the changes are initially being introduced on a trial basis for the first two years to assess the impact and wholetime staff will be able to provide more flexible cover including at different locations.

- **Areas of deprivation**

Oxfordshire has low overall levels of deprivation relative to England overall. However there are ten areas in Oxford City, four in Banbury and one in Abingdon which fall within the 20% most deprived areas in the country, with two of the Oxford city areas falling within the 10% most deprived. Inequalities also exist beyond these specific areas, with averages across an area not always telling the story of the individuals and families within it.

These communities and individuals are necessarily often more frequent users of many public services. The overall budget proposals have been developed with the objective of effectively targeting services so that we continue to meet our obligations to protect the most vulnerable and fulfil our statutory duties.

The proposal to increase the availability of online/self-testing STI screening may benefit people living in areas of deprivation. Online service will increase access to service which will be delivered to the choice and convenience of service users.

17% of people who work in routine and manual occupations in Oxfordshire are likely to be smokers (compared to 25% regionally and 25.4% nationally) and are also more likely to live in areas of deprivation. This group will therefore remain a priority area for support to stop smoking.

Potential Impact on Staff:

Proposals to reduce the number of hot desks available at Jubilee House will have a potential impact on Oxfordshire County Council staff that use these facilities as there will fewer places to work at this location. Consultation with staff has been undertaken prior to the proposal and has highlighted that current hot desks are not used at full capacity; staff will also be able to use Wi-Fi facilities in breakout areas if all hotdesking facilities are in use.

Potential Impact on other Council services:

Proposals to reduce community outreach facilities for adults with learning disabilities and people at risk of homelessness may increase demand on other service areas including those delivering statutory services. There may also be increased work for Customer Services, complaints and social work teams as any changes are implemented, this will be mitigated by preparing a full communications plan to ensure staff are aware of changes and how to signpost to advice.

A full needs assessment will be undertaken prior to implementing any proposed changes in order to understand the potential impact on other service areas and we will continue to work with voluntary and partner organisations to explore alternative methods of service delivery.

Potential Impact on Providers:

The proposal to remove four minor civils gangs (contractors who carry out minor highways repairs and are funded through the capital programme) may impact on our provider (SKANSKA). Mitigations are in place to redeploy individuals affected wherever possible and have been accepted by the provider.

Reducing the overall number of care placements may put additional pressure on services that provide support at home, the Council is committed to developing a range of different services that provide this care as set out in its most recent Market Position Statement.

The proposal to reduce Community Outreach service contract value may affect the financial viability of the voluntary and community sector providers that currently deliver these services. We will work with providers to stage any reductions in staffing and activity in line with reductions in income.

Social Value

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

How might the proposal improve the economic well-being of the relevant area?

The budget proposals are intended to maximise the economic wellbeing of the area, both by working more efficiently, redesigning our services delivery to reflect the changing needs of our communities and maximising our income and investment opportunities.

Meeting the rising demand of caring for older people, adults with disabilities and keeping children safe remain key priorities. This includes ensuring that any negative financial impact on individuals is minimised and that the sustainability of provision is maintained and improved.

How might the proposal improve the environmental well-being of the relevant area?

The Council has acknowledged the climate emergency, and made a number of commitments to address this by reducing its own use of carbon and encouraging others to do the same. All proposals have been developed within this context, and will be tested to ensure their climate and overall environmental impact is minimised.

Some proposals (such as implementation of LED streetlighting) are intended to have a direct positive impact on the environment, whereas others (such as reducing care home placements and people being supported in their own homes for longer) could have an indirect impact by reducing people's need to travel to visit family and friends.

CABINET – 21 JANUARY 2020

Service and Resource Planning 2020/21 – 2023/24

Comments from the Performance Scrutiny Committee

The January meeting of the Performance Scrutiny Committee considered the proposed budget for 2020/21, Medium Term Financial Plan to 2023/24, Capital Programme to 2029/30 along with the draft Corporate Plan and Outcomes Framework. This has differed from previous years where the Committee would consider this during December and January because of the General Election in 2019.

This report details the comments raised by the committee in relation to 2020/21 – 2023/24 Service and Resource Planning for consideration by Cabinet in agreeing its proposed budget.

In relation to pressures and savings made the following overarching points:

- The Committee is supportive of the invest to save measures outlined in the proposed budget and is keen to monitor the return on this investment during the next financial year
- The Committee is pleased to see specific actions in place to address our declaration of a climate emergency

The committee also made a number of specific comments in relation to directorate proposals, as follows:

Communities:

- The Committee are pleased to see commitments in the budget to developing a holistic approach to active and healthy travel particularly if this leads to the development of a county-wide cycle network and encouraged officers to work directly with Councillors (ref: 21COM6)
- Greater clarity is needed between the funding to address the climate action emergency and air quality monitoring, whilst the two aspects are linked it should be made clear that these are both distinct areas of work (ref: 21COM7)
- Greater clarity is needed to explain what a 'minor civil works gang' is and how the staff involved in this will be redeployed, particularly where this is to support a great level of locality-based working (ref: 21COM45 and 21COM31)

Commercial Development, Assets and Investment:

- The Committee requested a more detailed paper at a future meeting to understand the costs associated with bringing our assets to a satisfactory operating level (ref: 21CDAI12)

Public Health:

- The Committee were impressed with the strategic approach taken by Public Health and the desire to make greater use of health inequalities data to inform service provision. This was particularly evident from the proposals to target smoking cessation provision (ref 21PH11), working to support the Family

Safeguarding Model (ref: 21PH5) and the increased capacity in weight management services (ref: 21PH6)

- The Committee were also pleased with the proposed introduction of online testing for STIs. This provides an additional confidential means of testing and it will also make it easier for those living in rural communities to access such services (21PH9)

Children's Services:

- The approach to the children's services element of the budget is different to what we have seen in previous years, continued rising demand in the areas of Educational, Health and Care Plans; school transport and school exclusions are being addressed through an 'invest to save' approach and the Committee intends to monitor the return on investment throughout the forthcoming year
- The Committee understands that the continued rise in demand is mirrored nationally and, in many instances, a national solution is needed. In particular, the Committee discussed the issues associated with school exclusions when the local authority is still held accountable for the overall number of exclusions, despite the individual decisions now being the responsibility of individual schools/academies. The Committee would encourage Cabinet to lobby the government for change on this issue
- The Committee also noted that Ofsted school inspections have highlighted safeguarding duties as an area of concern at a number of schools in recent inspections and where there are instances that require the County Council to intervene in such situations, the Committee asks that consideration is given to recharging these costs to academies
- The Family Safeguarding Model has the potential to dramatically change the way we work with families and schools and the Committee requested that it is kept informed with developments of the model, particularly whether the new model results in improved retention rates for social workers

Adult Social Care:

- The Committee supports the approach being taken in Adult Social Care to enable an earlier response, better use of family and community assets and being more innovative in meeting service demand. It hopes that the funding dedicated to social care innovation (21AD3) produces results and is keen to be kept informed of developments
- The Committee supports the development of a new sustainable home care relationship, particularly given that the county has the second highest hourly rates for home care in the country. Councillors requested a more detailed briefing on home care costs at a future meeting
- The Committee is supportive of the additional funding for the transformation of mental health and autism (21AD11 and 21AD12) and the decision not to implement the previous staffing reduction (20AD19) and is keen to explore the implications of this as part of the mental health outcomes contract item scheduled for the next Committee meeting

Corporate Plan and Outcomes Framework:

The Committee made the following observations on the draft Corporate Plan and Outcomes Framework:

- In relation to any content about schools, the Council should be clear where it has a direct responsibility to deliver or only the ability to influence change
- The Committee felt that measures in relation to children were too specific and requested further consideration of any which might help to demonstrate how the Council is improving the life experience of children and young people in
- There should be consideration given to including clearer measures in the outcomes framework in relation to our income generating activities/aspirations
- The Committee queried whether information from FixMyStreet was an accurate measure of pothole repairs and customer satisfaction with highways issues
- Noted that more work is needed to develop measures for the Council's new approach to locality working

Review of Fees and Charges:

The Committee requests the Cabinet considers further increase to fees and charges in relation to pre-application planning advice for major developments and highways advice on the basis that these costs can be afforded by major developers.

Capital and Investment Strategy and Capital Programme:

The Committee were pleased that the Capital Programme includes plans to establish a £2.5m fund to address climate action following the resolution by Council to declare a climate emergency and requested assurances that the recently established Cabinet Advisory Group (CAG) for Climate Action would be consulted on use of the fund and that a diverse range of options would be considered.

Councillor Liz Brighthouse
Chairman of the Performance Scrutiny Committee

January 2020

SERVICE & RESOURCE PLANNING 2020/21 – 2023/24 Capital & Investment Strategy and Capital Programme

Executive Summary

1. This annex sets out the proposed Capital & Investment Strategy along with supporting strategies including the Treasury Management Strategy and Investment Strategy as well as the Capital Programme. It should be read in conjunction with the Corporate Plan annex and Revenue Budget and Medium Term Financial Plan annex which sets out the draft council tax precept for 2020/21, the revenue budget for 2020/21 and the Medium Term Financial Plan (MTFP) to 2023/24.
2. The Prudential Code for Capital Finance in Local Authorities requires that for each financial year, a local authority should prepare at least one Investment Strategy which should contain the disclosures and reporting requirements specified in the guidance. The Capital & Investment Strategy alongside the Treasury Management Strategy Statement 2020/21 meet these requirements is set out at within this annex.

Introduction

3. The service & resource planning report to Council in February will be set out in four sections:
 - Section 1 – Leader of the Council’s overview
 - Section 2 – Corporate Plan
 - Section 3 – Chief Finance Officer’s statement on the budget
 - Section 4 – Budget Strategy and Capital Programme
4. This report forms the basis of part of Section 4 to that report. The following appendices are included:

Appendix A	Capital & Investment Strategy 2020 - 2030
Appendix B	Investment Strategy 2020/21
Appendix C	Capital Programme Changes 2020/21 – 2029/30
Appendix D	Pupil Place Plan 2019/20 – 2023/24
Appendix E	Highways Asset Management Plan 2019/20 – 2023/24
Appendix F	Treasury Management Strategy (including prudential indicators and minimum revenue provision policy statement)

Outstanding Information

5. There are several grant notifications, including the Schools Condition Capital Grant, which are outstanding. Where information is outstanding, assumptions have been included in the capital programme for 2020/21 to 2029/30.
6. Once this information is finalised, there could be an impact on the capital programme. In light of the information outstanding, it is proposed that authority is delegated to the Leader of the Council, following consultation with the Director of Finance and the Cabinet Member for Finance, to make appropriate changes to the Cabinet’s proposed capital programme ahead of the Council meeting on 11

February 2020. All Councillors will be notified of any updated information once it is received.

Capital & Investment Strategy

7. The Prudential Code for Capital Finance in Local Authorities was updated by the Chartered Institute of Public Finance and Accountancy (CIPFA) in December 2017. The code requires that for each financial year, a local authority should prepare at least one Investment Strategy which should contain the disclosures and reporting requirements specified in the guidance. The Capital & Investment Strategy at Appendix A plus the Treasury Management Strategy at Appendix F meet these requirements.
8. The Prudential Code requires authorities to look at capital expenditure and investment plans in the light of overall organisational strategy and resources and ensure that decisions are made with sufficient regard to the long run financing implications and potential risks to the authority. The objectives are to ensure that the capital expenditure plans of local authorities are affordable, prudent and sustainable and that treasury management decisions are taken in accordance with good professional practice and in full understanding of the risks involved.
9. As part of the service & resource planning process for 2020/21 the council is required to approve a set of prudential indicators which show that the council's prudential borrowing is prudent, affordable and sustainable, the Treasury Management Strategy sets out the draft prudential indicators. Appendix F also incorporates the minimum revenue provision (MRP) policy statement for 2020/21. Legislation requires Council to approve a statement of its policy annually before the commencement of the financial year.
10. The ambition for the Capital Programme is that the schemes contained in the programme will all be defined from council strategies that determine the management of its assets, services and needs. The structure of the Capital Programme has therefore been amended and is now based around the supporting strategies rather than the previous structure that was presented on a Directorate basis. During 2021/22 there will be a fundamental review of the capital programme against these strategies, but in the forthcoming year, the proposal is that only essential requirements will be built into the programme.
11. The Capital & Investment Strategy sets out the priorities for investment, linked to the individual strategies and plans for the following programme areas:
 - **Pupil Place Plan:** including basic need (new schools and expansion), maintenance, health and safety and improvements
 - **Property Strategy (in development):** including estates, health & safety, maintenance, improvements and the Investment Strategy
 - **Highways Asset Management Plan:** including street lighting, and bridges
 - **ICT Strategy:** including broadband and End User equipment
 - **Passported Funds:** including Disabled Facilities Grant and Devolved Schools Capital
 - **Vehicles and Equipment:** including fire and rescue vehicles and equipment

- **Major Infrastructure:** including Housing & Growth Deal, HIF and Local Growth Fund schemes
- **Corporate:** including earmarked reserves and contingency

Capital Programme 2019/20 – 2029/30

12. The following table summarises proposed changes to the existing capital programme and additional funding available, including the addition of the extra year:

Strategy	Proposed Additions £m	Proposed Re-allocations £m	Additional Specific Funding £m	Corporate Resource Requirement £m
Pupil Place Plan	51.6	-0.9	-44.8	5.9
Highways Asset Mgmt Plan	82.9	0.0	-48.0	34.9
Property Strategy	16.5	-20.7	-2.5	-6.7
ICT Strategy	15.9	-14.0	0.0	1.9
Total	166.9	-35.6	-95.3	36.0

Additional Corporate Resources	-24.0
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Current Capital Programme Balance: Shortfall (+)	6.4
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TOTAL OVERALL CAPITAL PROGRAMME BALANCE: Shortfall (+)	18.4
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13. The additional corporate resources are based on changes to assumptions for un-ringfenced grants that have been estimated for over the ten-year programme. The updated assumptions include an additional £5.0m of basic need funding, £1.0m of school's maintenance funding and £18.0m of highways funding. These forecasts will be revised each year as further funding announcements are made.
14. The allocations agreed as part of last years' Service & Resource Planning process have been reassessed in line with the emerging pressures for this year and some allocations have been removed to release funding for priorities.
15. The proposed strategy allocations are based on a combination of identified schemes with known budget requirements, identified schemes with estimated budget requirements and general allocations where services can bring forward business cases to add specific schemes to the programme.
16. Details of the individual proposals are set out in Appendix C to this Annex.
17. The current Capital Programme has an overall shortfall of £6.4m. Ahead of a fundamental review of the programme, it is proposed that an overall shortfall of £18.4m in the new Capital Programme is agreed. This will be reviewed during 2020/21, and a decision made to either remove schemes, rephase schemes or a decision made to borrow to fund the shortfall.

18. The additional specific funding allocations alongside additional corporate resources will increase the capital programme to over £1bn. A shortfall of £18.4m over the 10 year period of the plan can be managed in the short term as cash flow is positive. The capital programme also has an overall contingency to help manage the position if required.
19. The table below shows the total proposed Capital Programme:

Strategy	Programme	Specific Funding	Corporate Resource Requirement
	£m	£m	£m
Pupil Place Plan	242.2	-143.3	98.9
Highways Asset Mgmt Plan	377.3	-260.2	117.1
Property Strategy	103.3	-81.1	22.2
ICT Strategy	29.9	-7.0	22.9
Passported Funds	11.1	-11.1	0.0
Vehicles & Equipment	1.4	0.0	1.4
Corporate	84.8	0.0	84.8
Major Infrastructure	249.4	-211.4	38.0
Total	1,099.4	-714.1	385.3
Total Corporate Resources			-366.9
TOTAL OVERALL CAPITAL PROGRAMME BALANCE: Shortfall (+)			18.4

Investment Strategy (Appendix B)

20. A new Investment Strategy was approved by Council in September 2019. This strategy sets out the investment framework, under which the Council can undertake investments against the following broad categories:
- Investments in property funds, bond funds, equities and multi asset classes.
 - Maximising the use of and value of our own assets (land & buildings).
 - Acquisitions & investments, which derive a service outcome or Council priority, and which generate a commercial return.
 - Investments for policy, social, community benefits.
21. The proposed capital programme includes an allocation of £10m within the Property and Asset programme for the new Investment Strategy. As business cases are brought forward, they will be subject to the governance arrangements and criteria as set out in the Investment Strategy.
22. Full Council is required to approve the Investment Strategy on an annual basis. To align with the Capital Programme and financial year, it is set out, unchanged, at Appendix B.

Pupil Place Plan (Appendix C)

23. The Pupil Place Plan includes present and predicted future pupil numbers on roll, together with information about birth rates, school capacity, and new housing. The Plan sets out proposed changes in the number of school places available over the next year and it suggests where other changes may be necessary in the future.
24. Primary Education Sufficiency Planning: Current data indicate that the number of births in Oxfordshire peaked in 2010 and 2011, which corresponds broadly to the very high demand for Reception places for 2015. Demand for Reception places has been falling in most areas since then but is now forecast to start rising again in areas experiencing significant housing growth. The latest pupil projections (submitted to the DfE this summer) show a 5.8% increase in primary pupil numbers between 2018/19 and 2023/24. Planning for primary school sufficiency is now more focused on housing growth, rather than the birth-rate led pressure over the previous decade, and as a result growth in demand for school places will not be evenly spread between schools. In many areas the increases in capacity provided in recent years will be sufficient to meet the demand of the period covered by the Pupil Place Plan, but there will be some further expansions of schools in areas of housing growth. There will also be more new schools opened within significant housing developments.
25. Secondary Education Sufficiency Planning: Secondary pupil numbers are now growing strongly, at a rate of about 2% per year, as the higher numbers in primary schools are now feeding through to secondary schools. The latest pupil projections show a 19.7% predicted rise between 2018/19 and 2023/24. The Council is working closely with secondary schools to ensure sufficient capacity as the population growth moves through into secondary school. As this growth follows a period of falling numbers, in some cases secondary schools have sufficient capacity to meet the population growth expected over the period covered by the Pupil Place Plan. Where schools are expected to need to expand, options for doing so are being explored. There will also be several new schools required, usually related to areas of significant housing growth.
26. Special Education Provision Sufficiency Planning: A new SEND Sufficiency Strategy was approved by Cabinet in December 2018. Work is now underway to implement the strategy, including securing the opening of new special schools in Bloxham and Didcot; rebuilding and expanding Northfield School in Oxford; expanding John Watson School and Bardwell School; and extending the county's network of special needs resource bases.
27. Section 3.3 of the plan sets out the schemes already in development as a result of adopted Local Plans and other known growth. An additional allocation of £50.7m is proposed over the ten-year programme to meet the identified need.

Highways Asset Management Plan (Appendix D)

28. The draft Highways Asset Management Plan (2020 – 2025) sets out the focus and prioritisation for Highway Maintenance investment. It seeks to balance local community needs with efficient asset condition decisions. The document also sets out the principles of how risk-based decisions will be made.

29. To support value for money and effective programme management, the plan sets out investment for different activity for the next 5 years, including identification of specific schemes over the next two years for the larger maintenance schemes.
30. In addition to the general maintenance, a focussed programme on Road Safety, Accessibility, and bus journey times is being developed. New programme inclusions are set out in Appendix B.

Property Strategy

31. An outline of the property strategy to cover the needs of all of OCC directorates is anticipated to be set and agreed by the end March 2021. Implementation of the property strategy will take approximately another two to three years.
32. The development of the new strategy will act as a mechanism for assessing the property portfolio from all angles and will be directly linked with the wider ongoing work to:
 - support service areas across the county to deliver their services to residents
 - enable and support the Council's workforce strategy
 - act as a catalyst for service co-location and integration
 - inform opportunities that can feed into the investment strategy
33. All service directorates will be involved in the development of the property strategy through providing information required in terms of their service delivery needs from a property point of view. This will allow the most appropriate strategy to be developed which fits the needs and objectives of services. A draft Implementation plan will then be developed which optimises the use of existing assets and considers the necessity of the creation of new assets to meet the ongoing needs of the council over the next five to 10 years.

ICT Strategy

34. The Information and Communication Technology Strategy was approved by Cabinet in December 2019. The proposed ICT programme includes the reallocation of existing £9m block in the programme to meet the initial outcomes of the strategy. This includes investment of £7.8m in an End User Computing refresh to Improve ICT services for all staff and customers which is tangible in the day to day use of technology and in how ICT staff operate. It is expected that investment in ICT will support better decision making, reduce the overall cost of ICT to the Council and provide better value for money.

Treasury Management Strategy (Appendix F)

35. Treasury management is the management of the council's cash flows, its banking, money market and capital transactions; the effective control of the risks associated with those activities and the pursuit of optimum performance consistent with those risks. The treasury management strategy statement and the annual investment strategy for 2020/21 are set out in Appendix F. They set out, amongst other things the investment strategy for the Council's temporary cash flow surpluses.

36. The prime objective of the council's investment strategy is to maintain capital security whilst ensuring that there is the necessary liquidity to carry out its business and only once these have been satisfied should the return on the investment be considered. The annual investment strategy for 2020/21 continues with this premise. The strategy for financing prudential borrowing during 2020/21 maintains the option of using temporary internal balances.
37. During 2019/20, due to higher than forecast cash balances, a decision was made to increase the limit for longer term lending from £150m to £180m to take advantage of peer to peer lending rates (loans to other Local Authorities) which also offer greater security than some other investment types. It is proposed to increase this limit to £200m for 2020/21, then reduce back down to £150m by 2023/24 as the average forecast balance reduces. This has an impact on the revenue budget and is reflected in Annex 2 of this report.
38. The treasury management strategy sets out an investment approach that maintains a balance between medium and long term deposits with local authorities and short-term secured and unsecured deposits with high credit quality financial institutions. With the prospect of interest rate remaining low for the medium term, and with an increase in peer to peer lending rates amongst Local Authorities, it is proposed to increase the duration for deposits with other Local Authorities from three years to five years.
39. It is proposed that any changes required to the 2020/21 treasury management and investment strategies are delegated to the Director of Finance in consultation with the Leader of the Council and the Cabinet Member for Finance. This is included in the recommendations at the beginning of the report.

LORNA BAXTER
Director of Finance

Capital & Investment Strategy - 2020/21 to 2029/30

Purpose and Objectives

1. The Prudential Code for Capital Finance in Local Authorities was updated by the Chartered Institute of Public Finance and Accountancy in December 2017. The code requires that for each financial year, a local authority should prepare at least one Investment Strategy which should contain the disclosures and reporting requirements specified in the guidance. The Strategy must be approved by full Council.
2. The definition of an investment covers all the financial assets of a local authority as well as other non-financial assets that the organisation holds primarily or partially to generate a profit; for example, investment property portfolios. This may therefore include investments that are not managed as part of normal treasury management processes or under treasury management delegations.
3. The objectives of the Prudential Code are to ensure that the capital expenditure plans of local authorities are affordable, prudent and sustainable and that treasury management decisions are taken in accordance with good professional practice and in full understanding of the risks involved.
4. The Prudential Code requires authorities to look at capital expenditure and investment plans in the light of overall organisational strategy and resources and ensure that decisions are made with sufficient regard to the long-term financing implications and potential risks to the authority.
5. The Prudential Code sets out that in order to demonstrate that the authority takes capital expenditure and investment decisions in line with service objectives and properly takes account of stewardship, value for money, prudence, sustainability and affordability, authorities should have in place a capital strategy. The capital strategy should set out the long-term context in which capital expenditure and investment decisions are made and gives due consideration to both risk and reward and impact on the achievement of priority outcomes.
6. This Capital & Investment strategy sets out the requirements of the Prudential Code covering all the investments of the authority and covers the following areas:
 - The Council's Corporate Plan priorities and the local context
 - Financial context and funding streams
 - Approach to capital investment
 - Capital Programme financing principles

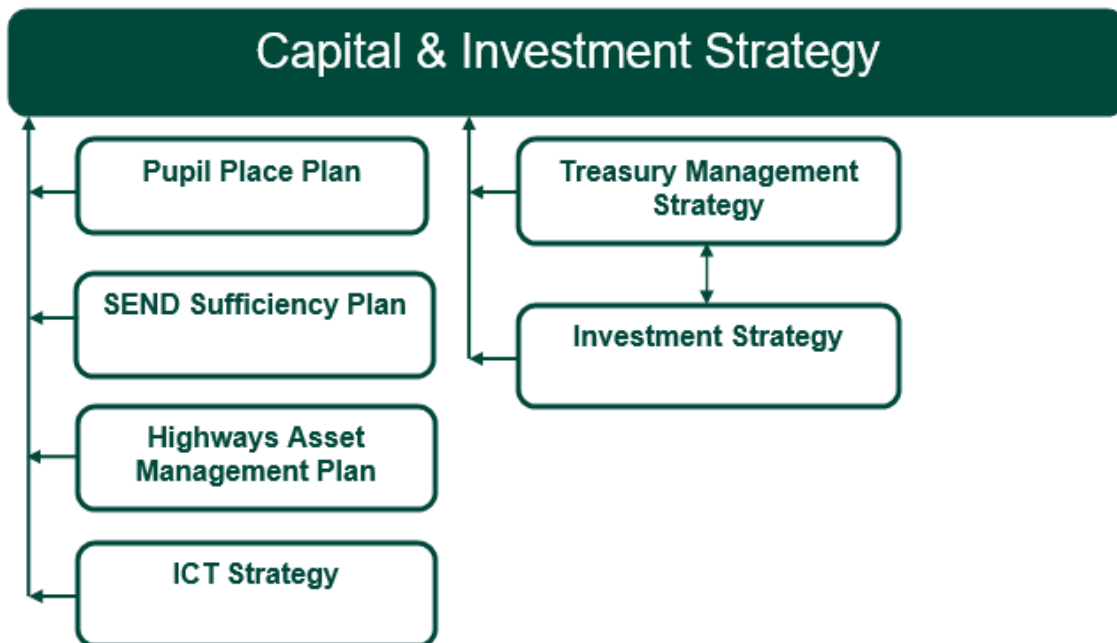
- Capital programme approach and overview of existing Capital Programme
- Capital investment proposals for 2020/21 – 2029/30
- Capital governance and decision-making
- Prudential Indicators for capital finance
- Treasury Management Strategy Statement (including external debt)

Introduction

7. The Capital & Investment Strategy is a policy document that outlines Oxfordshire County Council's approach to investments over the next ten years. It is closely linked to other key strategic and policy documents, such as:
 - The Corporate Plan
 - The Oxfordshire Infrastructure Strategy (OxIS)
 - Oxfordshire Local Industrial Strategy
 - Oxfordshire Joint Statutory Spatial Plan
 - The Financial Strategy including the Medium Term Financial Plan
8. This strategy reflects the ambition for the Capital Programme where the schemes contained in the programme will all be defined from council strategies that determine the management of its assets, services and needs. The structure of the Capital Programme has been amended and is now based around the supporting strategies rather than the previous structure that was presented on a Directorate basis. The main supporting strategies include Pupil Place Planning, Highways Asset Management Plan, Investment Strategy, Oxfordshire Infrastructure Strategy, the developing Property Strategy (see paragraph 24), and the ICT Strategy.
9. During 2021/22 there will be a fundamental review of the capital programme against these strategies, but in the forthcoming year, the proposal is that only essential requirements will be built into the programme.
10. The new capital programme is structured as follows:
 - **Pupil Place Plan:** including basic need (new schools and expansion), maintenance, health and safety and improvements
 - **Property and Estates:** including health & safety, maintenance, improvements and the Investment Strategy
 - **Highways and structural maintenance:** including street lighting, and bridges
 - **ICT Strategy:** including broadband and End User equipment
 - **Passported Funds:** including Disabled Facilities Grant and Devolved Schools Capital
 - **Vehicles and Equipment:** including fire and rescue vehicles and equipment

- **Major Infrastructure:** including Growth Deal
- **Corporate:** including earmarked reserves and contingency

11. The proposed allocations are based on a combination of identified schemes with known budget requirements, identified schemes with estimated budget requirements and general allocations where services can bring forward business cases to add specific schemes to the programme.
12. This diagram shows relationship between the Capital and Investment Strategy and supporting plans and strategies:



13. The Capital & Investment Strategy complements the key documents above by defining the approach, structure and governance for the effective financing and management of the Council's capital investment needs and ambitions. It outlines how capital investment contributes to the Council's priorities and how the Council's existing and proposed capital resources will be effectively managed to meet the planned needs plus opportunities for meeting the ambitions for longer term capital investments.
14. It is inevitable that the level of capital resources required to meet capital investment needs and aspirations will exceed the actual resources available. Therefore, one of the key purposes of the Capital & Investment Strategy is to ensure that capital projects or programmes are only approved where they accord with the capital investment principles.
15. The Council seeks to employ a variety of different resources to close the funding gap. In this context, the second key purpose of the Capital & Investment Strategy is to ensure that capital investment plans are affordable, prudent, sustainable and demonstrate value for money. It provides the framework for

determining capital spending plans and the effective use of the Council's capital resources.

The Council's Corporate Plan Priorities

16. The Capital & Investment Strategy emphasises the significant contribution that the capital programme can make in delivering the corporate priorities of thriving communities, thriving people and thriving economy and in bringing benefits for wider communities. It embraces the Council's philosophy of putting residents at the heart of everything we do; and, through the delivery of programmes and schemes will ensure adherence to the Council's own strategy for Climate Action. This strategy also seeks to ensure that resources are used in the most efficient way and support the Council's objectives most effectively.

Partnership Working

17. The Council has a strong vision to create sustainable places by working closely with its partners. It recognises that it can only achieve its objectives through partnership working and is therefore committed to working with public, private, voluntary and community organisations.
18. The Council has a history of pursuing joint-working and joint-service delivery initiatives for better outcomes for communities and residents of the County. It will continue to actively seek opportunities to work in partnership to provide capital investment in Oxfordshire.
19. The Council is currently working with:
 - All Oxfordshire District Councils, the City Council and OxLEP to deliver the Housing & Growth Deal;
 - OxLEP to deliver Local Growth Fund projects;
 - Cherwell District Council through our joint partnership arrangements; and
 - Oxfordshire District Councils and the City Council to deliver One Public Estate Projects.

Capital Investment Principles

20. The Council's approach to capital investment is integral to the Council's financial planning processes. The approach aims to ensure that:
 - a. Capital expenditure contributes to the achievement of the priorities set out in the Corporate Plan;
 - b. An affordable and sustainable capital programme is agreed;
 - c. Use of resources and value for money is maximised;
 - d. A clear framework for making capital investment decisions is provided;
 - e. A corporate approach to the use of capital resources is maintained;

- f. Sufficient assets to provide services are acquired, or built, and maintained;
- g. Invest to save initiatives to make efficiencies within the Council's revenue budget are encouraged;
- h. Investment in existing assets to enhance their value, including acquisition of land, is supported;
- i. An appraisal and prioritisation process for new schemes is robust

Capital Programme Financing Principles

21. The Council's capital programme financing principles are:

- a. The government grants received for basic need, school maintenance and highways maintenance are treated as a single flexible pot that fund the statutory requirements of the provision of school places and school and highways maintenance as the first priority.
- b. Capital receipts are also treated as a corporate resource and used across the capital programme flexibly.
- c. The Council will continue to be proactive in ensuring, as far as possible, that all additional capital investment needs arising from new developments are funded from developer contributions.
- d. Ringfenced resources are used for the purposes for which they are issued.
- e. Prudential borrowing will be considered where:
 - i. capital investment will result in future revenue savings and the cost of borrowing can be met from the savings; or
 - ii. the council has a significant unmet capital need. The borrowing is repaid from revenue over the life of the asset and this implication is taken into account when assessing the affordability of the proposal.
 - iii. It contributes towards the overall investment approach, subject to clear and demonstrable business case;
- f. The Council will try wherever possible to influence investment through the targeted use of its limited capital resources to lever in other investment to meet its objectives. However, the Council is clear that projects that may bring in further investment will only be supported if they meet the Council's priorities and objectives. The Council also evaluates long-term implications of accepting any external funding provision, in particular on its revenue budget.
- g. The Capital Programme will maintain a 3% contingency level.
- h. The Council will continue to employ an effective year-end financing strategy that is aimed at minimising the liability on the revenue budget. The first calls on capital resources are therefore external funding (including S106), grants, capital receipts and reserves. The final calls, where necessary, are on prudential borrowing.

Investment Strategy

22. In September 2019 Council approved the Investment Strategy. This is included at Annex C - Appendix B. The Investment Strategy sets out an investment framework under which the Council can undertake investments against the following broad categories:
- investments in property funds, bond funds, equities and multi asset classes;
 - maximising the use of and value of our own assets (land & buildings);
 - acquisitions & investments, which derive a service outcome or Council priority, and which generate a commercial return;
 - investments for policy, social, community benefits.
23. The Prudential Code requires that where authorities have commercial investments, that local authorities should disclose the contribution they make towards the service delivery objectives and/or place making role of the authority. In addition, the types of investment, due diligence processes, the proportionality of those investments and the local authority's risk appetite are also required to be set out. Currently there are no such investments but going forward these will be included in the annual update of this strategy.

Developing Property Strategy

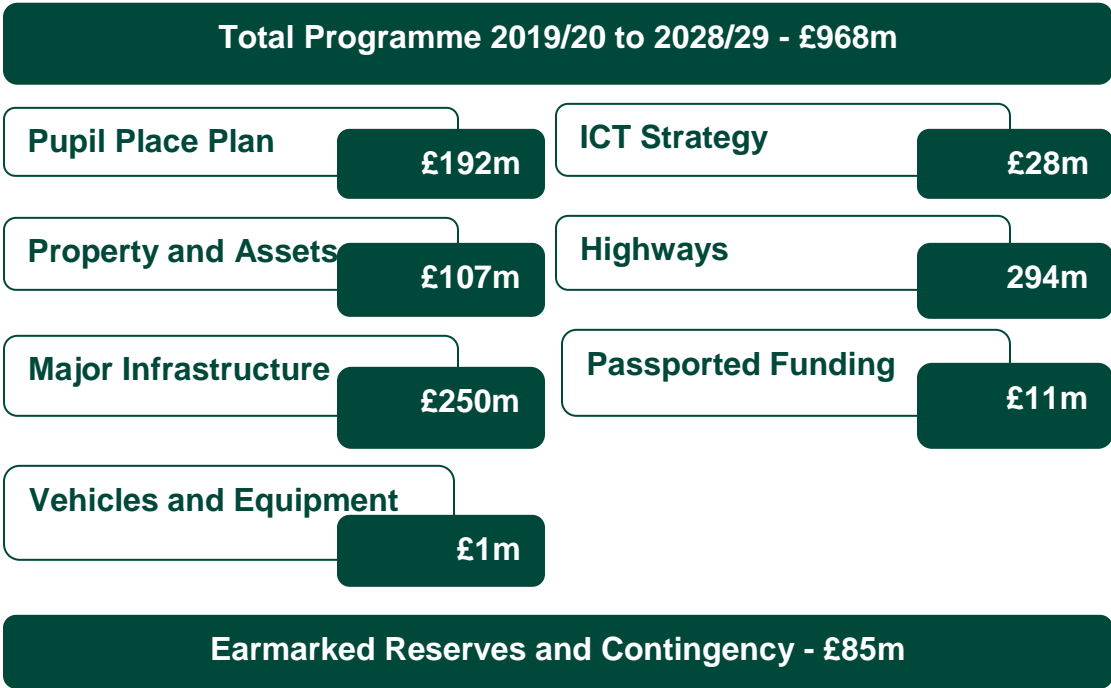
24. The Investment Strategy will be supported by the development of a Property Strategy which in turn will be informed by an organisation wide workforce strategy.
25. The Property Strategy will act as a mechanism for assessing the property portfolio from all angles and will be directly linked with the wider ongoing work to:
- a. support service areas across the county to deliver their services to residents
 - b. enable and support the Council's workforce strategy
 - c. act as a catalyst for service co-location and integration
 - d. inform opportunities that can feed into the investment strategy
26. The development of the property strategy will involve all the service directorates of the Council, who will be responsible for providing the information required in terms of their service delivery needs from a property point of view. In that way we will be able to develop the most appropriate strategy which fits exactly the needs and objectives of each area to enable them to execute their delivery strategies in the future.
27. A draft Implementation plan will then be generated that captures models for operational and non-operational sites which optimises the use of existing

assets and considers the necessity of the creation of new assets to meet the ongoing needs of the council over the next five to 10 years.

- 28. Various workshops will be facilitated by the Property, Investment and Facilities Management team with all key stakeholders to establish some key principles for the development of the property strategy. This will include items such as:
 - a. Clear direction of each directorate’s service short/medium/long-term delivery strategies
 - b. Engagement and co-location opportunities with partners
 - c. Localities, community hubs and area-based service designs
 - d. Climate Action impact
 - e. Financial impact
 - f. Identify and evaluate key assets for investment opportunities

Capital Programme Overview

29. The current capital programme for 2019/20 to 2028/29 totals £968m¹. The diagram below sets out the current programme summary:



30. The existing programme includes School Basic Need projects, the annual highways maintenance programme and large transport schemes that have received specific government grant funding. These include City Deal, Local

¹ Based on the Capital Programme presented to Cabinet in December 2019

Growth Fund, the Housing and Growth Deal. The current programme also includes investments in the street lighting estate (£41m) funded by prudential borrowing. The borrowing cost for this investment will be funded by the reduction in revenue costs in relation to street lighting.

31. The programme includes a further £120m investment in highways maintenance (£80m) and property (£40m) funded by prudential borrowing. This borrowing can be afforded based on an assumption that the growth in the Council Tax base will be above the level assumed in the Medium Term Financial Plan.
32. The £80m investment in highways maintenance was approved by Cabinet in September 2018. The investment has enabled an increase to the annual maintenance programme over the 10-year programme. Making repairs to roads already in poor condition will reduce the number of potholes that arise and improve the longevity of future repairs in these areas, thus reducing the increasing pressure on revenue resources.
33. In September 2018 Cabinet approved a £40M investment in Property to manage legacy issues relating to property maintenance and the demise of Carillion. That investment has enabled essential works to be completed, with clarity to the programme work required going forward. The priority is to ensure that the estate remains compliant with statutory and health and safety requirements.
34. The Pupil Place Plan programme includes an investment of £19.5m linked to the SEND strategy, agreed by Cabinet in December 2018, to increase the provision of Special School places in the county. £10m of this relates to the rebuild of Northfield School with an expanded number of places. Further amounts are available for additional SEN bases at mainstream schools and the expansion of existing special schools. The school's estate allocation also includes provision to increase the number of early year's places across the county.

Capital investment proposals 2019/20 - 2028/29

35. The new Capital Programme proposed alongside this strategy, extends the programme period to 2029/30. Details of proposed new capital investments are set out in Annex 3 – Appendix C.
36. In addition to extending the programme by a year, the allocations have been reviewed in light of emerging proposals, agreed programmes and revised funding levels.

37. The Pupil Place Plan sets out the need for school expansions and new schools. Section 3.3 of the plan sets out the schemes already in development as a result of adopted Local Plans and other known growth. An additional allocation of £50.7m is proposed over the ten year programme to meet the identified need.
38. The proposed programme includes a £10.0m allocation within the Property and Asset programme for the new Investment Strategy. As business cases come forward they will be subject to the governance arrangements and criteria as set out in the Investment Strategy.
39. Within the Highways and Structural Maintenance programme an allocation of £53m is proposed for urgent works to Kennington Bridge. A submission has been made to Department for Transport for grant funding of £30m and third-party contributions of £18m are also sought. The remaining £5m coming from corporate resources. This may need to be reviewed if the grant application is unsuccessful.
40. The Information and Communication Technology Strategy was approved by Cabinet on 19 December 2019. The proposed ICT programme includes the reallocation of existing £9m block to meet the initial outcomes of the strategy. This includes investment of £7.8m in an End User Computing refresh to improve ICT services for all staff and customers which is tangible in the day to day use of technology and in how ICT staff operate. It is expected that investment in ICT will support better decision making, reduce the overall cost of ICT to the Council and provide better value for money.

Governance Arrangements

41. The Prudential Code sets out that the responsibility for decision making and on-going monitoring in respect of capital expenditure, investment and borrowing, including prudential indicators, remains with full council. Although detailed implementation and monitoring may be delegated to a committee.
42. The capital governance arrangements were reviewed during 2019 and interim arrangements were agreed which are still in place. The governance arrangements will be reviewed during 2020.

Council and Cabinet

43. Council and the Cabinet are the key democratic decision-making bodies as per the Council's constitution. The Council approves the key policy documents and the capital programme as part of the Council's Policy and Budgetary Framework. The Cabinet recommends priorities, policy direction and the capital programme to the Council for approval. The Cabinet also approves new

inclusions to the capital programme in line with the scheme of delegation and the financial procedure rules.

Delegated Powers to Officers

44. Delegations to officers are set out in full in Section 5 of the Council’s Financial Regulations. In addition, all officers are bound by the scheme of delegation.
45. The Section 151 Officer, jointly with the Corporate Director Communities, are responsible for ensuring that appropriate arrangements are in place to monitor the capital programme and resources, control expenditure against approved budgets, and address any problems of overspending or resource re-allocation.

Capital Programme Implementation

46. The Council operates a two-stage approval process for capital resource allocation. If a project is approved at stage 1, it is accepted in principle to the capital programme and is allocated a project development budget. This stage is also called “commit to investigate”. At stage 2, the project receives full approval for work to commence and expenditure to be incurred, subject to the budget constraints of the project delivery budget allocation.
47. A business case supports each approval stage that has:
 - Analysed a range of possible solutions at the feasibility phase of each major capital investment;
 - Based the options appraisal on the life cycle costs of possible solutions, including the discounted cost of future expenditures to determine their affordability;
 - Explored different project delivery models that, where possible, include partnerships, sharing costs with other organisations, obtaining grant contributions or generates revenue income;
 - Recommended the option that ensures the capital investment secures the maximum benefit.

Capital Expenditure Definitions

48. Expenditure which qualifies as capital under this strategy is set out on the Council’s intranet using the link below. It also sets out information on de-minimus values, abortive costs, abnormal costs and leases.

<https://intranet.oxfordshire.gov.uk/cms/content/what-capital-expenditure>

INVESTMENT STRATEGY 2020/21

Introduction

1. This strategy sets out a new investment framework, under which the Council can undertake investments against the following broad categories:
 - investments in property funds, bond funds, equities and multi asset classes;
 - maximising the use of and value of our own assets (land & buildings);
 - acquisitions & investments, which derive a service outcome or Council priority, and which generate a commercial return;
 - investments for policy, social, community benefits.
2. Continuing reductions in Central Government funding, at a time when Councils are facing increasing demand for services and an aging population, means that alternative sources of income and optimisation of council assets and resources need to be identified. The investment strategy is intended to enhance the financial resilience of the Council by investing to:
 - secure new sources of income,
 - increase income from existing assets, and/or
 - increase capital growth.
3. The development of an investment portfolio is considered appropriate so long as authorities have a clear and transparent strategy with suitable governance arrangements in place, having access to the necessary skills to understand and manage the commercial risk involved, and establish affordability over the long term.
4. The Council has a key leadership role to play in placemaking in Oxfordshire. The investment decisions that it makes have the potential to greatly enhance the well-being and prosperity of communities across the county. The Council will consider the community value and social value of investment opportunities when making its decisions. Similarly, investments can also support the development of new delivery models for the benefit of residents, businesses, and visitors. The Council will also prioritise opportunities that are carbon neutral, use/generate green energy, or reduce travel and waste. This is all part of our contribution to healthy place shaping and climate change.
5. The Council has existing property and land portfolios which, for a number of reasons, may be surplus to requirements. There is therefore an opportunity to review these assets and resources, and then evaluate the most suitable options in order to optimise operational efficiency, customer access, and economic and financial value.
6. Furthermore, there are opportunities to support regeneration or growth using Council assets to lever in further investment or combine with other private or public sector assets to achieve specific regeneration and growth objectives.

7. An investment strategy also offers opportunities for generating income from assets and the opportunity to deliver a long term and sustainable income. This may be achieved through the capital programme or various investment vehicles which offer a range of diverse options to generate income, particularly where there can be a margin between the net return and the funding costs. Each investment opportunity will be evaluated against stringent financial criteria to ensure each delivers gross income aspirations whilst taking consideration of the costs of operating, including lending, acquisition and operating costs where relevant.

Statutory Framework

8. The Ministry for Housing, Communities and Local Government (MHCLG) has policy responsibility for the Prudential System. This covers the responsibility for ensuring that the statutory guidance drives local authorities to make borrowing and investment decisions in a way that is commensurate with their statutory responsibilities and the best value duty. It also includes overall responsibility for the Local Government finance system, including understanding the risks to the system from changes in the types of borrowing and investment activities that local authorities are undertaking.
9. The Prudential Code requires that where authorities have commercial investments, that local authorities should disclose the contribution they make towards the service delivery objectives and/or place making role of the authority. In addition, the types of investment, due diligence processes, the proportionality of those investments and the local authority's risk appetite are also required to be set out. The Government also recognises that local authorities have a key role in local economic regeneration, and this may mean that they choose to take on projects that the private sector would not consider.

Investment Objectives

10. The Council's investment objectives are defined as follows:
- To support growth, regeneration, and help deliver the Council's strategic objectives;
 - To reinvest income in line with agreed targets to ensure growth of the portfolio and maximise long term returns/income;
 - To ensure the portfolio is governed and administered in a way that supports long term sustainability for the Council and residents of Oxfordshire.
 - To reinvest equivalent funding whenever we release key property & investment assets to ensure the portfolio size is maintained and increased over time.¹

¹ Contributions of £40m from land development and disposal are already formally committed to the Capital Programme

Investment Categories

11. Investments have been grouped into four broad categories as set out below

A	B	C	D
Investments in property funds, bond funds, equities and multi asset classes (either through treasury management activities or capital)	Maximise use of and value of our own assets (land & buildings) linked to the Council's forthcoming Property Strategy	Investments, which derive a service outcome or Council priority, and which generate a commercial return	Investments for policy, social, community benefits (which may be at a cost)

Category A

12. The Council already has a portfolio of investments as part of its Treasury Management activities. The strategic approach to these investments is reviewed on an annual basis as part of the Treasury Management Strategy Statement & Annual Investment Strategy. It is proposed that any change to investments that are classified under Category A are managed using the current Treasury Management governance framework. However, it is important to consider the portfolio of investments as a whole, especially as some investments in this category may be classified as capital expenditure rather than treasury management activity.

Category B

13. The Council already owns a sizeable property portfolio (buildings and land) comprising of operational and non-operational assets. Assets which are determined as surplus to operational requirements, via the upcoming Property Strategy, will be considered for investment purposes.² The resource to undertake effective management of our property assets already exists in-house, and investment in our own assets can be seen as a continuation and extension of work already underway. However, should the scale and nature of the work change significantly then it may be necessary to review the way in which this work is managed and delivered to ensure the organisation has the correct capacity and skills.
14. Non-operational Sites - as part of OCC's decision to release its small-holdings estates in the 1990s, the organisation purposely held onto sites that were recognised to hold long term potential for residential development. Since this time staff have worked to promote development of these sites through the local plan process seeking approval for collaboration agreements and disposals via Cabinet. There are currently a number of major development sites totalling 86 hectares, that are in progress, with anticipated receipts expected from 2024. £40m of the anticipated receipts are already included with

² Please note that on occasions assets may be released in part, with the remaining space retained for operational purposes.

the capital programme funding up to 2028/29.³ The table below shows the extent of our remaining non-operational land holdings that have development value.

Phases	Land Holdings	Indicative Timescales
In Progress	~86 hectares	Major Receipts 2024 onwards
Medium Term	~17 hectares	Receipts c.2035-40 onwards
Long Term	~29 hectares	Receipts c.2040-50 onwards

15. Operational Sites - closely linked to Transformation and the Property Strategy, the Council has the potential to make further changes to how staff work in and use buildings in order to rationalise space and better match customer requirements. Using operational space more efficiently has the ability to both reduce running costs and generate income from the commercial market. Over the last decade there has been significant work to improve the utilisation of sites leading to a 25% reduction in running costs. A number of key Council-owned sites in central Oxford were reviewed in 2018 with input from external property consultants, validating the case for releasing and redeveloping specific sites in order to generate income.⁴ With access to funding, under the investment strategy, there is potential across the estate to further optimise the use of our assets and invest in them to maximise capital values and/or rental yields.

Category C

- 16. This type of investment reflects the acquisition of assets, that we would then manage and/or develop for others to lease. Such investments would be undertaken for the primary purpose of achieving policy benefits or service outcomes (whether this is supporting economic growth, delivery of services, as well as making a financial return and therefore support our other Council objectives).
- 17. In relation to land acquisitions, where the intention of the purchase is to increase land value rather than contribute towards service delivery objectives, is considered to be a low risk commercial activity. Likewise, transfers of existing land holdings with an expected future increase in value, is also considered to be a low risk commercial activity.

Category D

- 18. These investments aim to deliver a wider social, service, or community benefit, and may come at a cost. They may include:
 - Delivery of projects that otherwise might stall or not progress if left in private sector hands but will fulfil Council objectives;
 - Momentum where intervention by a Council can then unlock or lead to confidence in the market from third parties;

³ The majority of these receipts will not be realised until at least 2024 onwards.

⁴ Or in some case, increase a capital receipt which could then be reinvested.

- Non-financial gains where inward investment can create/maintain jobs/ training;
- Purchase of underperforming property assets which provide key strategic regeneration opportunities to generate the catalyst for economic development;
- Partnering with others to deliver broader benefits and unlock financial investments for the area that would otherwise be lost.

Reporting and Management of Investment Portfolio

19. All investment activity will be grouped and reported as a single portfolio and reflected in the Council's Capital & Investment Strategy, which requires agreement via the annual budget setting process. As part of this, a new portfolio will be created in the Capital Programme to cover dedicated funding for investments. Investments and returns will be monitored and appropriately balanced across the 4 investment categories. Decisions over the use and reinvestment of proceeds of the portfolio will be taken with a due regard for the long-term growth of the portfolio.

Governance

20. It is proposed that investments in Category C will follow the governance route set out below. Investments in Categories A, B, & D will follow existing governance routes in line with the Council's Constitution and Financial Procedure Rules (FPRs). Categories B & D will require submission of a Capital Business Case or equivalent. However, all categories will be reported annually as part of the Council's Capital & Investment Strategy as part of the governance of the Council's budget setting process.
21. The property investment market is very competitive and needs consistent and quick decisions if the Council is going to be successful in managing assets in this environment. It is therefore proposed that an Investment Advisory Panel is established to act as an advisory body for these initial decisions. They should ensure the decisions fall within the Corporate Strategy and are based upon the approved investment matrix (See Appendix A). They will then report their recommendations to Cabinet or Full Council in line with current governance, along with appropriate due diligence to support decision-making.
22. The Investment Advisory Panel will be made up of:

Members

- Leader of the Council
- Deputy Leader of the Council
- Cabinet Member with responsibility for Finance
- Cabinet Member with responsibility for Property
- Leader of the Opposition
- Performance Scrutiny Chair
- Leader of the secondary Opposition Group⁵

⁵ N.B. The Leader of the second largest Opposition Group will only attend, when the roles of Leader of the Opposition and the Chair of Performance Scrutiny are held by the same person.

Officers

- Chief Executive
- Senior Officer with responsibility for Finance (Section 151 Officer)
- Senior Officer with responsibility for Investment
- Senior Officer with responsibility for Property
- Monitoring Officer

23. The primary purposes of the Investment Advisory Panel would be two-fold:

- To consider recommendations from officers regarding the potential purchase of a property asset, prior to submission of a bid. This would include consideration of the yield, and the Investment Evaluation based on the criteria set out. The ultimate consideration would be whether to submit a bid or not, and at what value.
- To consider the results of the due diligence process, (following acceptance of an offer from Council to purchase an asset), with the ultimate consideration of whether to endorse the purchase and proceed to exchange of contracts.

24. Due to the pace at which this sector operates, where there is no alternative, decisions to submit bids, approve purchases and exchange of contracts would be taken as urgent decisions by the Leader and S151 Officer in consultation with the Investment Advisory Panel and reported to the next available meeting of Cabinet and any other existing governance routes as appropriate. Where a decision is not time-bound they will go via current governance arrangements and be approved by Cabinet or Full Council as required. It should be noted that a number of investment decisions are likely to be time critical, and whilst not requiring the 'urgent decision' process, may require entry onto the Cabinet forward plan at short notice or potentially an extraordinary Cabinet meeting.

25. Given the need to react quickly and take timely decisions, meetings of the Investment Advisory Panel may need to be convened on a 'virtual' basis. In order to ensure the necessary governance, the meeting should include:

Members - at least two of:

- Leader of the Council;
- Deputy Leader of the Council
- Cabinet Member with responsibility for Finance;
- Cabinet Member with responsibility for Property.

Officers - must include:

- Senior Officer with responsibility for Finance (Section 151 Officer), or Deputy Section 151 Officer;

And at least one of:

- Chief Executive;
- Senior Officer with responsibility for Investment;
- Senior Officer with responsibility for Property;
- Monitoring Officer.

26. No substitutes may vote at the Panel or contribute to the voting quorum. However, the Section 151 Officer may send their Deputy Section 151 Officer. Meetings must be held in person or as a conference call/video call. Prior to the meeting taking place the following completed documentation should be circulated (in confidence) to all members of the panel at least 3 working days before the meeting. If any member is unable to attend they can submit questions to be considered by the panel at their meeting.
- For potential purchase: completed proforma (see Appendix B) detailing the background information and overview of the asset, completed initial scoring matrix (see Appendix A) and reasons for the scores and any other initial external views of the asset that may be relevant at that time;
 - For properties being considered for endorsement of purchase: completed due diligence as agreed at previous investment panel.
27. A proposition will not be considered if it does not meet the investment criteria i.e. it falls below the minimum score of 50% on the scoring matrix. Where a Category C investment relates to land acquisition and cannot properly be assessed via the current scoring matrix it will be assessed via a scoring matrix for land acquisitions, which will be developed in due course. Following the meeting a note of the recommendations made and the reasons for these to be completed will be recorded and circulated to all members of the group, whether in attendance or not. Appended is an Investment Matrix and Proforma, which helps in assessing the link to corporate objectives, suitability and return from any investments, and the risk profile that the Council is prepared to accept in considering any potential investments.

Implementation Plan

28. Although investment strategy will enable the Council to respond to opportunities as they arise, there is also a need to develop a programme of planned investment projects linked particularly to Type B investments. Following adoption of this strategy there will likely be a need to resource and forward fund elements of this work. There are also key interdependencies with Transformation and the Strategic Asset Management Plan that will need to be worked through in order to align activities that impact staff and operational sites.

Annex 3 – Appendix B

Scoring Criteria	Score	4	3	2	1	0	Initial Unweighted Score	Weighted Score
	Weighting Factor	EXCELLENT/ VERY GOOD	GOOD	ACCEPTABLE	MARGINAL	UNACCEPTABLE		
Location - In county /Adjacent to county and can still add value	25.0	Prime	Good	Secondary	Tertiary	Remote		0
Tenancy - Strong Covenant	15.0	Single tenant with strong financial management	Multiple tenants with strong financial covenant	Single tenant with good financial covenant	Multiple tenants with average financial covenants	Tenants with poor financial covenant strength		0
Tenure	10.0	Freehold	150+ year unexpired with no LL controls	150+ with minimal landlord controls/gearing below 5%	Lease under 150 years	Lease under 100 years		0
WARRANTY - Weighted Average Unexpired Lease Term	20.0	20 years +	15 years +	10 years +	5 years +	Less than 5 years		0
Repairing Terms	10.0	FRI	75% + on FRI	50% + on FRI	Internal repairing Only, Cap Ex required	Short term leases with high landlord responsibilities, Cap Ex required		0
Profile	10.0	Super Core	Core	Value Add	Opportunistic			0
Management Resources	10.0	Minimum. Single tenant, FRI	Minimum. Fully let, no more than 3 tenants	Moderate. Common parts, service charge etc.	Active but well managed to date	Active and historical lack of management		0

CAPITAL INVESTMENT PLANNING 2020/21 - 2029/30
Changes to existing Capital Programme

Strategy - Capital Investment Need	Proposed Additions	Proposed Reallocations	Specific Funding	Corporate Resource Requirement
	£'000	£'000	£'000	£'000
Pupil Places				
Basic Need	49,714	0	-44,886	4,828
School Structural Maintenance Programme	1,600	0	0	1,600
School Access Programme	200	0	0	200
Temporary Classrooms Programme - Replacement & Removal	100	0	0	100
Schools Accommodation Intervention & Support Programme	0	-900	0	-900
Pupil Places - Total	51,614	-900	-44,886	5,828
Highways / Structural Maintenance				
Kennington Bridge	53,000	0	-48,000	5,000
Drayton Depot	1,000	0	0	1,000
Accessibility and Road Safety Schemes	10,000	0	0	10,000
Bus Journey Time Reliability	5,000	0	0	5,000
Structural Maintenance	13,900	0	0	13,900
Integrated Transport Block (inc Incentive funding)	0	0	0	0
Highways / Structural Maintenance - Total	82,900	0	-48,000	34,900
Property & Estates				
Corporate Estate				
Urgent Structural Maintenance - Corporate Estate 2020-22	3,000	0	0	3,000
Corporate Minor Works Programme	500	0	0	500
Health & Safety Programme	116	0	0	116
Latent Defects Programme	0	-3,000	0	-3,000
Waste Strategy	0	-13,000	0	-13,000
Asset Utilisation Programme	0	-3,000	0	-3,000
Investment Strategy	10,000	0	0	10,000
Museum Service - Reconfiguration	0	-750	0	-750
Crisis Provision	0	-950	0	-950
Climate Action	0	0	0	0
One fleet - EV Charging point	400	0	0	400
Climate Action Revolving Fund	2,500	0	-2,500	0
Property & Estates- Total	16,516	-20,700	-2,500	-6,684
ICT Strategy				
End User Computing refresh	7,800	0	0	7,800
Wide Area Network replacement (Zero Trust)	1,850	0	0	1,850
Programme Delivery	3,280	0	0	3,280
ICT Strategy 6-10yrs	2,000	0	0	2,000
ICT Strategy 1-5yrs	1,000	0	0	1,000
ICT Replacement (Realign to above)	0	-9,000	0	-9,000
ICT Transformation	0	-5,000	0	-5,000
ICT Strategy - Total	15,930	-14,000	0	1,930
TOTAL PROPOSED STRATEGY CHANGES	166,960	-35,600	-95,386	35,974
Additional Corporate Resources (additional year of funding)				
Schools Basic Need				-5,000
Schools Annual Programmes (e.g. Maintenance)				-1,000
Highways Maintenance				-18,000
TOTAL ADDITIONAL CORPORATE RESOURCES				-24,000
Current Capital Programme Balance: Shortfall (+) Surplus (-)				6,440
TOTAL OVERALL CAPITAL PROGRAMME BALANCE: Shortfall (+) Surplus (-)				18,414

Oxfordshire County Council

Pupil Place Plan

2019-2023

November 2019



For 2019/20, the DfE has approved a change in primary school planning areas for Oxfordshire. Several of the previous planning areas have been subdivided into smaller areas, to support more detailed planning. This Pupil Place Plan is structured according to the larger areas – e.g. “Abingdon” – but comments have been made relating to the smaller sub-areas – e.g. “Abingdon East” – where appropriate. Pupil forecasts at sub-area level have been provided in the Annex.

The list of schools starting on page 43 indicates which planning area each is in.

The detailed data section starting on page 53 also indicates which planning area each is in, where this is relevant.

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For further information about school place planning, in the first instance contact the School Organisation & Planning team:

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1. INTRODUCTION

Oxfordshire County Council sees its democratic mandate as having regard for the educational outcomes for all Oxfordshire children and young people in state funded education, regardless of the status of the provider institutions.

The county council has a statutory duty to ensure that sufficient places are available within their area for every child of school age whose parents wish them to have one; to promote diversity, parental choice and high educational standards; to ensure fair access to educational opportunity; and to help fulfill every child's educational potential.

We also have a responsibility to ensure, as far as reasonably practicable, that there are sufficient childcare places to ensure that families can:

- a) access the funded early education entitlements for their child;
- b) take up, or remain in work; or
- c) undertake education or training, which could reasonably lead to work.

The county council also has a duty to respond to any representations from parents who are not satisfied with the provision of schools in the local area. This could be regarding the size, type, location or quality of school provision.

Since 2011, new providers of school places have been able to establish state-funded free schools outside of the local authority school planning process, and now all new schools are deemed to be free schools. There are also a growing number of schools that have converted to become academies, which are also independent of local authority control.

School places are no longer, therefore, solely provided by the county council, and the council must work with these other providers to ensure that the need for school places is met. However, the county council has a unique responsibility to make sure there are enough school and childcare places available for local children and young people. No other local or national body shares the duty to secure sufficient primary and secondary schools.

Although there has been no statutory requirement to publish a School Organisation Plan since 2004, it is considered good practice to produce a plan related to pupil place planning to clearly set out the framework for, and approach towards, the provision of places.

This Pupil Place Plan shows local communities, and those interested in their development, how we expect school provision to change over the next few years. It brings together information from a range of sources and sets out the issues the county council will face in meeting its statutory duties for providing nursery and school places up to 2023 and beyond.

The Plan includes present and predicted future pupil numbers on roll, together with information about birth rates, school capacity, and new housing. The Plan sets out proposed changes in the number of school places available over the next year and it suggests where other changes may be necessary in the future. The Plan also sets out our policies on school organisation and the statutory framework for making changes such as opening, closing or enlarging schools.

2. SCHOOL ORGANISATION CONTEXT

Oxfordshire is a county which is experiencing rapid growth and this is having a significant impact on school planning. Having an up-to-date Pupil Place Plan provides an essential framework for effective planning within this context. An updated plan also provides key partners with trends and data to inform their future decision-making. This Plan is updated and approved annually.

Oxfordshire is a more rural county than South East England as a whole, with one third of the population living in rural areas; primary education in particular plays a critical role in community cohesion and supporting both rural and urban communities. 20% of Oxfordshire's total population is aged 18 or under. The 2011 Census showed that the number of pre-school children had grown by 13% compared to 2001: these children are now starting to arrive at secondary school.

2.1 Oxfordshire's education providers

Early education

Local authorities are not expected to deliver early years provision themselves but to work with providers, including maintained schools, in order to ensure there is sufficient provision available to meet families' needs.

Delivery of early education and childcare provision in Oxfordshire is through a mixed market of private and voluntary providers, including pre-schools, day nurseries and childminders, and through schools, including academies and free schools. There are also seven local authority maintained nursery schools.

The Council publishes an annual Childcare Sufficiency Assessment which is available at www.oxfordshire.gov.uk/cms/content/childcare-sufficiency-market-assessment.

Primary education

As of October 2019, Oxfordshire is home to 240 state sector mainstream schools providing primary education, three of which also provide secondary education. Included in this total are three Infant schools and two Junior schools; all other primary schools provide education for children aged 4-11, and many also offer places for younger children, either directly or through co-located private, voluntary and independent childcare providers of funded early years education. The county council has an above average number of pupils being admitted to their first-choice school, with 93% of on-time applicants offered their first preference primary school for September 2019.

In 2009 the DfE approved a 'Primary Strategy for Change for Oxfordshire'. Through a process of locality review and joining up funding streams, the aim is to provide an outstanding primary school in the heart of the community. The principle of, wherever possible, 1 form entry and 2 form entry schools (i.e. admission numbers of 30 or 60) being the preferred model of school organisation in Oxfordshire was acknowledged. This means that schools are ideally organised to allow admission of one full form of

entry or two full forms of entry in any one year. This allows classes to be organised as multiples of 30 pupils per year group which conforms to statutory class size requirements and most effective use of revenue resources.

Intakes of 15 and 45 are also models which are used in many county schools: these models require by definition some mixed year group teaching, usually with two year groups per class. In some schools, local conditions require intakes such as 10 or 20 per year, which require a greater degree of mixed age teaching.

Secondary education

As of October 2019, Oxfordshire is home to 41 state sector mainstream schools currently providing secondary education, including three schools providing for the 14-19 age range: Futures Institute Banbury (formerly Banbury Space Studio, opened 2014), UTC Oxfordshire in Didcot (2015) and Bicester Technology Studio (2016).

The most common model of curriculum delivery is 11-18 years with a sixth form, although there are four south Oxfordshire schools currently offering 11-16 study only. Three of Oxfordshire's schools provide "all-through" primary and secondary education. Studio Schools and University Technical Colleges cater for the 14-19 age range.

- **University Technical Colleges (UTC)** specialise in subjects that need modern, technical, industry-standard equipment such as engineering and construction, teaching these disciplines alongside business skills and the use of ICT. They are sponsored by a local university and employers, and often work in partnership with FE colleges and established academy trusts. They are usually for 500-800 students.
- **Studio Schools** are small schools for 300 students. With year-round opening and a 9-5 working day, they feel more like a workplace than a school. Working closely with local employers, studio schools offer a range of academic and vocational qualifications including GCSEs in English, Maths and Science, as well as paid work placements linked directly to employment opportunities in the local area.

Specialist education

Oxfordshire is home to 15 state sector schools providing specialist provision for children with special educational needs, including one Alternative Provision Academy (Pupil Referral Unit) and one Hospital School.

These include eight community based special schools providing for children aged 2 to 19 with severe learning difficulties, and profound and multiple learning difficulties. There is countywide provision for children with social, emotional and mental health difficulties, primary and secondary to age 18, and a countywide residential academy for children with autism, severe learning difficulties and challenging behaviour.

Two new special schools are planned in Bloxham and Didcot, which will focus on social, emotional and mental health needs and autism. The first of these, Bloxham Grove in north Oxfordshire, is due to open for the 2020/21 school year.

In addition, some mainstream schools include specialist resource bases to provide additional support to children with high level and more complex needs, including hearing impairment, autism, language and communication needs, physical disabilities and moderate learning difficulties. Oxfordshire is working to increase the number of bases in the coming years, as planned new schools are specified to incorporate resource bases, unless there is already one serving the area.

All pupils attending a special school or specialist resource base in Oxfordshire will have a statement of SEND, an Education, Health and Care Plan, or be undergoing an assessment of their special educational needs. The decision about admission to a special school or resource base is based on clearly defined indicators. Each child is considered carefully according to their needs by a panel of experienced professionals. Parental views are taken into consideration.

School planning areas

For the purposes of school planning, primary schools and secondary schools are organised into school planning areas. These planning areas are set by local authorities, but must be approved by the DfE as providing a realistic and accurate picture of school capacity constraints. DfE guidance on setting planning areas is available at www.gov.uk/guidance/local-authority-pupil-planning-areas.

In Oxfordshire, planning areas are based on secondary schools and their feeder primary schools. Where a town has more than one secondary school (Abingdon, Banbury, Bicester, Oxford, Witney) it is treated as a single planning area for secondary school planning. Before 2019, primary school and secondary school planning areas in Oxfordshire were the same. However, for 2019 onwards, the DfE has approved a sub-division of some primary school planning areas, to allow for more precise planning. These are:

- Abingdon - divided into 4 sub-areas
- Bicester - divided into 4 sub-areas
- Burford - divided into 2 sub-areas
- Oxford - divided into 4 sub-areas
- Witney - divided into 2 sub-areas.

This Pupil Place Plan is structured according to the larger areas – e.g. “Abingdon” – but comments have been made relating to the smaller sub-areas – e.g. “Abingdon East” – where appropriate. Pupil forecasts at sub-area level have been provided in the Annex.

2.2 Policies and legislation

Set out below is a summary of key national legislation and local policies affecting school organisation.

Early education and childcare sufficiency

Provision of early education and childcare is vital for the local economy, and for developing stronger communities. The aim of childcare is to ensure parents are supported to be economically active, either in work, or in study or training for work. Early education focuses on the specific learning needs of very young children, to

prepare them for lifelong learning and ensure that they are ready to go to school. Funded early education for 2-year-old children aims to reduce levels of inequality and narrow the pre-school educational gap between disadvantaged and better off children.

Local Authorities are required to secure sufficient early years and childcare provision (*Childcare Act 2016; Childcare Act 2006; Children and Families Act 2014; The Local Authority (Duty to Secure Early Years Provision Free of Charge) Regulations 2014; The Local Authority (Duty to Secure Early Years Provision Free of Charge) (Amendment) Regulations 2016; The Childcare (Early Years Provision Free of Charge) (Extended Entitlement) Regulations 2016*)

- **Sufficient childcare** means securing the right type and volume of provision, so far as is reasonably practicable, for working parents, or parents who are studying or training for employment, for children aged 0-14 (up to 18 for a disabled child).
- **Sufficient early years provision** means families being able to access their free entitlement for qualifying 2, 3 and 4-year-old children.

Alongside the free entitlement some parents will wish to purchase additional childcare hours from their provider where, for example, they require more childcare to be able to work.

There remain some gaps in supply, by area, type or hours of provision. The council is actively exploring options to fill these sufficiency gaps, and some additional places have been secured and created in recent years which have increased the supply in areas of high need.

School places - local authorities' statutory duties

Education authorities have statutory duties to:

- Ensure sufficient school places (*Education Act 1996* Section 14).
- Increase opportunities for parental choice (Section 2 of the *Education and Inspections Act 2006*, which inserts sub-section 3A into S14 of the *Education Act 1996*).
- Comply with any preference expressed by parents provided compliance with the preference would not prejudice the provision of efficient education or the efficient use of resources (*School Standards and Framework Act 1998* Section 86).
- Ensure fair access to educational opportunity (Section 1 of the *Education and Inspections Act 2006* inserts sub-section 1(b) into S13 of the *Education Act 1996*).

Paragraph 94 of the *National Planning Policy Framework* (NPPF) states that it is important that a sufficient choice of school places is available to meet the needs of existing and new communities, and that local planning authorities should take a proactive, positive and collaborative approach to meeting this requirement, and to development that will widen choice in education. This includes local planning authorities giving great weight to the need to create, expand or alter schools when preparing plans and making decisions on planning applications.

Policy on spare school places

Not all unfilled school places can be considered “surplus”. The Audit Commission advises that some margin of spare school capacity is necessary to provide some flexibility for unexpected influxes of children and expressions of parental preference. The 2013 National Audit Office report *Capital Funding for New School Places* suggested it is “reasonable for authorities to aim for between 5 and 10 per cent primary surplus to allow them some opportunity to respond to parental choice” (para 1.17) and that 5% is “the bare minimum needed for authorities to meet their statutory duty with operational flexibility, while enabling parents to have some choice of schools” (para 1.16).

The 2004 Oxfordshire School Organisation Plan, which was adopted by the Oxfordshire School Organisation Committee acting under its statutory powers at that time contained within the School Standards and Framework Act 1998, set a target figure of 10% unfilled primary and secondary places as sensible for planning purposes in the county. For primary schools this was further refined to targets of 8% spare places in urban areas and 12% in rural areas in the Oxfordshire Primary Strategy for Change, which was first approved by OCC Cabinet in July 2006, and finally approved by DfE in 2009.

For school place planning purposes, these targets are applied to planning areas as set out in this Pupil Place Plan.

Similarly, for early education some spare places are required to ensure reasonable accessibility and an opportunity for parental choice. It should also be noted that any apparent surplus places in early years provision may not necessarily be available to all children, for example workplace nurseries may be primarily for employees’ children. In addition, early years pupil numbers can vary considerably across the year.

Special Educational Needs & Disabilities (SEND)

The *Children and Families Act 2014*, along with associated statutory guidance (*SEND Code of Practice 2015*) and other legislation, sets out the county council’s duties towards children and young people with special educational needs or disabilities. In addition, schools and local authorities have a duty to provide reasonable adjustments for disabled pupils, originally under *the Disability Discrimination Act 1995* and more recently under the *Equality Act 2010*. Oxfordshire County Council’s Accessibility Strategy (2013) sets out how it proposes to increase access to education for disabled pupils in the existing schools for which it is responsible, the reasonable adjustments duties and examples of good practice.

In parallel to the development of new mainstream primary and secondary school capacity, the council has a duty to ensure sufficient provision for children with special educational needs. In December 2018, the Council approved a new SEND Sufficiency of Places Strategy, which provides more detail on the county’s planning to meet the rising demand for specialist provision for children and young people with SEN and Disabilities. This strategy focuses on the five-year period 2018-2022, but also looks beyond to the following five-year period to 2027. Progress against the strategy will be reviewed annually and the strategy updated as required.

The strategy states that, by 2022, 300 additional special school places will be required in Oxfordshire, along with 100 additional places for pupils needing additional SEND support in mainstream schools.

Some principles have been developed to ensure “the right provision, at the right time, in the right place for every child” in each locality:

- The needs of vulnerable children and young people should be met locally wherever possible; therefore, a wide range of local provision is required to meet the diversity of needs.
- A strong equalities and early intervention focus should be promoted across all education providers.
- New provisions should promote inclusive opportunities for the most vulnerable children.
- New schools should be outward looking to support the local needs of the community, e.g. a multi-use approach throughout the year.
- Specialist provisions should be co-located or linked with mainstream provision.
- Specialist provisions should support learners in the local area, providing a range of outreach and in-reach functions.
- Children and young people access appropriate, quality assured interventions, in a timely way to improve engagement in learning and reduce the risk of exclusion from school.

Section 6 of this Plan shows the current spread of specialist provision across Oxfordshire, short term planning, and gaps in local specialist provision. This map of provision, alongside the population data, principles and aspirations, will help inform future decision making in relation to specialist provision.

Academies in Oxfordshire

As of September 2019, 98% of Oxfordshire secondary provision, 43% of primary provision and 47% of special school provision are academies. The Oxfordshire academy rate is higher than the national rate.

An academy is run by a charitable trust which is responsible for every aspect of managing the school. These trusts can be set up by a wide range of organisations including religious groups, educational specialists, employers, charities and community groups. They have greater flexibility in the way the school is run. For example, they can set staff pay and conditions; change the length of the terms and the school day; and are not obliged to follow the National Curriculum although they must teach English, Maths and Science.

Academies are not accountable to the county council and receive their budget directly from central government. The premises are typically leased to the trust by the county council on a 125-year lease if owned by the county council, or on an alternative basis if owned by a charitable trust or other landowner.

Where the trust runs more than one school it will usually appoint a local governing body to each school. Schemes of delegated powers from the Trust Board of Directors

to local governing bodies vary from trust to trust. Governors currently include a minimum of two parent governors, the headteacher and a person appointed by the trust.

The Academies Act 2010 enabled more schools to convert to academies, without always needing a sponsor. The Education Act 2011 expanded the programme to allow the establishment of 16-19 academies and alternative provision academies. In 2016 the Education and Adoption Act mandated Regional Schools Commissioners (RSC), acting on behalf of the Secretary of State for Education, to issue Academy Orders for any school judged to be inadequate by Ofsted. Local Authorities and governing bodies have been given a legal duty to facilitate this.

This legislation has a significant impact on the role of the local authority as the strategic commissioner of school places. Academies are responsible for setting their own admission number, and thus capacity and any plans for expansion, with the agreement of the RSC.

Capital funding for the basic need for new pupil places in all government-funded schools (including academies) because of local demographic changes, is allocated to local authorities according to the relative need for new places, based on forecast data provided by authorities. In deciding where to use basic need funding to provide additional places, local authorities are expected to consider fairly both their maintained schools and local academies, and where the additional places will be of greatest benefit to their children.

The Education and Adoption Act 2016 set out a continued commitment to the academies programme. In this context the county council, recognising that the diversity of educational provision in the county will continue to expand, reviewed its position on academy status. In October 2015 the county council cabinet agreed that the council should:

- Adopt a more assertive policy in identifying appropriate sponsors for schools required to convert to academy status;
- Promote appropriate groupings to form new Multi-Academy Trusts and encourage the growth of existing Multi-Academy Trusts based in the county;
- Further develop and promote the collaborative company model, both to incorporate more schools in these and to extend the scope of their pooling of resources and responsibility.

As well as supporting the conversion of schools to become academies, the county has seen the establishment of Free Schools, University Technical Colleges and Studio Schools, which are all classed as academies.

This Plan notes the schools which had converted to academy status by 1 May 2019. More conversions will take place during the lifetime of this Plan. In this Plan, the term “school” applies both to maintained schools and academies.

Oxfordshire Education Strategy

School place planning within Oxfordshire aims to support wider council and education strategies within the county.

The Oxfordshire County Council Corporate Plan 2019-2022, Thriving communities

for everyone in Oxfordshire (www.oxfordshire.gov.uk/corporateplan) sets out Oxfordshire County Council's vision for Oxfordshire: thriving people, thriving communities, a thriving economy.

Oxfordshire's *Education Strategy for Oxfordshire* details a vision for an autonomous and self-improving education system, which enables schools and settings to promote excellence and lead their own improvement. This is set within the context of a well-planned continuum of provision from birth to 25 that meets the needs of children and young people in Oxfordshire.

2.3 School organisation decision-making

To inform its duties as decision maker for school organisation issues the county council has a School Organisation Stakeholder Group consisting of County and District councillors and representatives of Head Teachers' associations, governors and Diocesan Boards of Education. From 2012, this group has incorporated the roles of the former School Admissions Forum.

The key activities of the group are to:

- Discuss overall strategic development in context of local authorities' statutory duties.
- Discuss developing options.
- Comment on statutory information and any written comments and objections as part of the statutory process.
- Discuss proposals submitted for Free Schools, University Technical Colleges and other academies.
- Provide advice on processes to identify sponsors for new academies which are required to meet population growth.
- Consider how well existing and proposed admissions arrangements serve the interest of children and parents within the area of the local authority.
- Monitor applications and admissions patterns on an annual basis.

Making changes to maintained (non-academy) schools

The *School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013* set out the way in which decisions are made about proposals to enlarge local authority maintained (i.e. non-academy) schools or make other significant changes such as altering the age range.

In October 2018, the DfE released updated *Guidance: Making Prescribed Alterations to Maintained School*. The purpose of this guidance is stated as:

- to ensure that additional good quality school places can be provided quickly where they are needed - it is expected that, where possible, additional new places will only be provided at schools that have an overall Ofsted rating of 'good' or 'outstanding'.
- that local authorities and governing bodies do not take decisions that will have a negative impact on other schools in the area;

- and that changes can be implemented quickly and effectively where there is a strong case for doing so.

The legislation requires full consultation to take place, particularly with parents, staff and governors. A statutory consultation and decision-making process must be followed to make the following “prescribed alterations”, whether they are proposed by the local authority or by the school governing body:

- Proposed permanent enlargement of the premises of the school, where this is both by more than 30 pupils and by at least 25% or 200 pupils (whichever is the lesser). For SEN schools these thresholds are 10% or 20 pupils, whichever is the lesser.
- Expansion onto a satellite site; closure of a satellite site, where the satellite is more than 1 mile from the main site; or transfer to a new site, where this is more than two miles from the current site.
- Decrease in the number of pupils in SEN schools (in mainstream schools, reductions in Published Admission Numbers are consulted on in accordance with the School Admissions Code).
- Establish/remove/alter SEN provision within a mainstream school.
- Change of types of need catered for by a special school.
- Establishing, removing or altering SEN provision at a mainstream school
- Closing an additional site, or transferring to a new site
- Change of age range.
- Change of category.
- Single sex school becoming co-educational, or vice versa.
- Change of boarding provision.
- Amalgamations.

For proposals to create school sixth forms:

- These are only expected to be allowed for schools which are rated as ‘good’ or ‘outstanding’ by Ofsted, with a history of positive Progress 8 scores, and where there is a genuine need for more sixth form places.
- The proposed sixth-form should provide places for a minimum of 200 students and either directly or through partnership, offer a minimum of 15 A level subjects.
- Financial viability should be demonstrated through evidence of financial resilience should student numbers fall and that the proposal will not impact negatively on 11-16 education or cross subsidisation of funding.

There are requirements to notify the DfE or Regional Schools Commissioner (RSC) of proposals considered potentially controversial:

- Involve expansion onto a separate ‘satellite’ site

- Where objections have been raised that the proposed change could potentially undermine the quality of education in the local area by creating additional places where there is surplus capacity

The statutory process was streamlined by the 2013 Regulations:

1. Publication of proposals.
2. Formal consultation – 4 weeks.
3. Decision by Cabinet Member (or Cabinet for more contentious proposals) – within 2 months of the end of the consultation period, or the decision defaults to Schools Adjudicator. In limited circumstances, there will be the right of appeal to the School Adjudicator.
4. Implementation: there is no maximum limit on the time between the publication of a proposal and its proposed date of implementation. However, proposers will be expected to show good reason (for example an authority-wide reorganisation) if they propose a timescale longer than three years.

An increase to a mainstream school's Published Admission Number that does not require a physical enlargement to the premises of the school does not require this statutory process. An increase in pupil numbers may be achieved solely by increasing the admission number in line with the School Admissions Code.

Changes that are not counted as a "prescribed alteration" can be made by the local authority or school governing body without following a statutory process; they are nevertheless required to adhere to the usual principles of public law. They must: act rationally; take into account all relevant and no irrelevant considerations; and follow a fair procedure. Local authorities and governing bodies are expected to work together on such changes, taking into account the wider place planning context, and ensure open.

Once a decision on the change has been made, the proposer (i.e. LA or GB) is responsible for making arrangements for the necessary changes to be made to the school's record in the government's GIAS (Get Information About Schools) system. These changes must be made no later than the date of implementation for the change and can be input in advance, once a decision is made. Further information is available from www.gov.uk in the section on *School organisation: statutory guidance*.

Closing maintained (non-academy) schools

The *School Organisation (Establishment and Discontinuance of Schools) Regulations 2013* set out the way in which decisions are made about proposals to close local authority maintained schools. In November 2018, the DfE released updated guidance on *Opening and Closing Maintained Schools*. The purpose of the guidance is stated as:

- To ensure that good quality school places are provided where they are needed, and that surplus capacity is removed where necessary.

Local authorities have the power to close all categories of maintained schools. The governing body of a voluntary, foundation, or foundation special school may also publish proposals to close its own school. Decisions related to school closures are

taken by the local authority following a statutory process to allow those directly affected by the proposals to feed in their comments.

Reasons for closing a maintained school include, but are not limited to, where:

- wider school reorganisation means that the school is now surplus to requirements (e.g. because there are surplus places elsewhere in the local area which can accommodate displaced pupils, and there is no predicted demand for the school in the medium or long term);
- it is to be “amalgamated” with another school (see below);
- it has been judged inadequate by Ofsted and there is no sponsored academy solution;
- it is to acquire, lose or change its religious character;
- it is no longer considered viable; or
- it is being replaced by a new school.

Where two (or more) schools are to be amalgamated, the legal process for this is to either close the schools and open a new one, or to close one (or more) of the schools and expand another to accommodate the displaced pupils. School amalgamations therefore require a statutory school closure process.

There is a presumption against closure of nursery schools and rural schools. This does not mean that such schools cannot be closed, but the case for closure should be strong and a proposal must be clearly in the best interests of educational provision in the area.

The Secretary of State may direct a local authority to close a maintained school requiring special measures (under section 68 of EIA 2006). This will usually be done only where there is no prospect of the school making sufficient improvements and where there is a sufficient supply of alternative school places in the area. Prior to making the direction, the Secretary of State must consult with the local authority, the governing body, and – in the case of a voluntary or foundation school – the diocese or other appointing authority. Such a direction will not require the publication of a statutory proposal for the school’s closure.

Under Section 17 of EIA 2006 the Secretary of State may also direct a local authority to close a community special or foundation special school if he/she considers it is in the interests of the health, safety or welfare of the pupils.

Further information is available from www.gov.uk in the section *School organisation: statutory guidance*.

Making changes to academies

New guidance on *Making significant changes to an open academy and closure by mutual agreement* was published by the government in October 2018. Much of the guidance mirrors the non-academy guidance, and it has the same stated purpose as the guidance for non-academy schools, including the expectation that only academies that are rated as ‘good’ or ‘outstanding’ will seek to expand.

The guidance emphasises the need for compatibility with local place planning. This includes “a strong expectation that academy trusts should work collaboratively with local authorities.... on pupil places planning, taking into account the increases or decreases in pupil numbers forecast in the area, especially in areas of basic need”, in order to support their local authority to provide sufficient school places for all pupils in its area. This could be through academies expanding their school premises, increasing their admission number or admitting over admission number.

Significant changes need to be approved by the Regional Schools Commissioner (RSC) and may require a full business case, or in some cases can follow a fast track route. In both cases, consultations should be undertaken for at least four weeks with all those who could be affected, and should include public and stakeholder meetings. For changes to admission arrangements, a six-week consultation period is required.

The “fast track” route only applies to academies rated as ‘good’ or ‘outstanding’ in their last inspection by Ofsted, which have a latest Progress 8 score of at least the national average, are in good financial health, have the capacity to make the change and can provide evidence that the local authority (and, if applicable, the trustees or diocese) do not object to the change. Fast track can apply to:

- Physical expansion of academies (with the exception of satellite expansions and expansion of sixth form provision or UTCs/studio schools)
- Change of age range by up to two years (excluding adding or removing a sixth form).
- Adding or increasing boarding provision.

However, a full business case is specifically required for proposals which:

- Reduce places in an area of basic need;
- Have received objections from the local authority and/or neighbouring schools, trustees or the diocese that the proposed change could potentially undermine the quality of education provided by other ‘good’ or ‘outstanding’ schools in the area, by creating additional places where there is already surplus capacity;
- Seek to set up a satellite site to the school;
- Make changes to UTCs and studio schools.

Other proposals which require a full business case are:

- Expansion of academies not rated “good” or “outstanding”. Only in very limited circumstances will the RSC consider such approval, for example: where the academy is in an area of critical basic need; all other options for providing additional places have been fully explored; **and** the academy has a robust improvement plan in place.
- Adding or removing a sixth form.
- Expansion of SEN academies by at least 10% or 20 pupils (whichever is the lesser).
- Changing age range by three or more years, or making age range changes which could be considered contentious or set a precedent for schools in their

local area or have a significant impact on local provision.

Amalgamations/mergers: one school must be closed and the other enlarged.

- De-amalgamations
- Faith-related changes.
- Transfer to another site.
- Change of gender composition.
- Change in type of SEN provision, or changes affecting provision reserved for pupils with SEN.
- Decreasing boarding provision by at least 50 pupils or 50% (whichever is the greater).

Further information is available from www.gov.uk in the document *Making significant changes to an open academy and closure by mutual agreement*.

Routes to opening new schools

The Education Act 2011 amended the Education and Inspections Act 2006 to change the arrangements for establishing new schools. In November 2018, the DfE released updated guidance on *Opening and Closing Maintained Schools*. The purpose of the guidance is stated as:

- To ensure that good quality school places are provided where they are needed, and that surplus capacity is removed where necessary.

Most new schools will now be established as academies, and since May 2015, all new academies are classified as free schools. There are a few limited circumstances in which the establishment of a new non-academy school can be proposed. Sections 10 and 11 of the EIA 2006 permit proposals to establish new schools under certain conditions either *with* the Secretary of State's consent (section 10 cases) or *without* (section 11 cases).

- A new community or foundation school to replace an existing maintained school (section 10);
- A new foundation or voluntary controlled school (section 10);
- A new voluntary aided school to meet demand for a specific type of place (section 11);
- A new community or foundation primary school that is to replace a maintained infant and a maintained junior school (section 11);
- A new school resulting from the reorganisation of existing faith schools in an area, including an existing faith school losing or changing its religious designation (section 11);
- A new foundation or community school, where suitable academy/Free School proposals have not been identified and a competition has been held but did not identify a suitable provider (section 11)
- A former independent school wishing to join the maintained sector (section 11); *or*
- A new maintained nursery school.

Excluding these circumstances, new schools are established as academies through two routes, both of which have resulted in new schools for Oxfordshire:

- The free school presumption process requires local authorities to seek proposals to establish a free school where they have clearly identified the need for a new school in their area. These are often referred to as “presumption” schools or LA-led proposals. The local authority runs a competitive process to invite potential academy sponsors to run the new school.
- Proposers can also apply directly to the DfE to establish a free school, through time-limited application waves. These are often referred to as “wave” schools or “central route” proposals. This route may be subject to specific criteria: for mainstream schools, for example in 2019, wave 14 for mainstream schools was targeted at areas with both low educational standards and demonstrable basic need for additional school places, which excluded Oxfordshire.

The government also runs variations of the free school process for specific types of free school. For example, in 2018, Oxfordshire was successful in submitting a bid for a new special school through a joint special and alternative provision free schools wave.

If a free school presumption competition does not yield a suitable proposal, then a statutory competition can be held under section 7 of the EIA 2006. This will not require a separate application for the Secretary of State’s approval, because the Secretary of State will inform the local authority that approval to hold a section 7 competition is given at the same time as informing the local authority that no suitable free school proposal was identified. Free school proposals and proposals for foundation, foundation special and voluntary schools can be submitted into the competition. However, the Regional Schools Commissioner (on behalf of the Secretary of State) will consider any free school proposals first when making a decision on the case. If a free school proposal is considered suitable, the competition ends and the proposer works with the department and local authority to progress its proposal. If a free school presumption proposal is not considered suitable, or none is received, the competition continues and it is for the local authority to decide whether to approve one (or more) of the maintained school proposals. Where a local authority holds a section 7 competition, the local authority must follow the statutory process set out in Schedule 2 to EIA 2006 and the Establishment and Discontinuance Regulations.

Oxfordshire’s process for opening new schools

In May 2018, the DfE published guidance on opening new academies, entitled *The Free School Presumption*.

Where the county council identifies the need for a new school, for example to meet the needs of housing growth, section 6A of EIA 2006 places it under a duty to seek proposals to establish a free school via the “free school presumption”. The publication, in this Pupil Place Plan, of the expected forward programme of new schools, provides academy trusts interested in opening new schools in Oxfordshire with prior notice of future opportunities. In some cases, academy sponsors may

choose to submit an application through an appropriate central government wave route for a school which the county council has identified as a future need, and if such a bid is successful, any free school presumption process would be ended, or deemed not necessary.

For all new schools which do not yet have an identified sponsor, Oxfordshire County Council seeks to liaise proactively with any groups interested in applying for a free school, as well as with the DfE, to ensure that all new schools support the local authority's statutory duty to provide sufficient school and early education places, as well as broader educational strategies and aspirations. Section 3.3 sets out the county council's current requirements for new schools.

The decision on all new free school proposals lies with the Secretary of State. Following a presumption process, the local authority recommends its preferred proposer to the Secretary of State, who will take this into account when choosing an academy sponsor, along with any additional factors of which the DfE is aware. The Secretary of State's decision is delegated to the Regional Schools Commissioner (RSC) for the area in which the school will be located.

Within Oxfordshire, the presumption process for identifying preferred providers for new academies is:

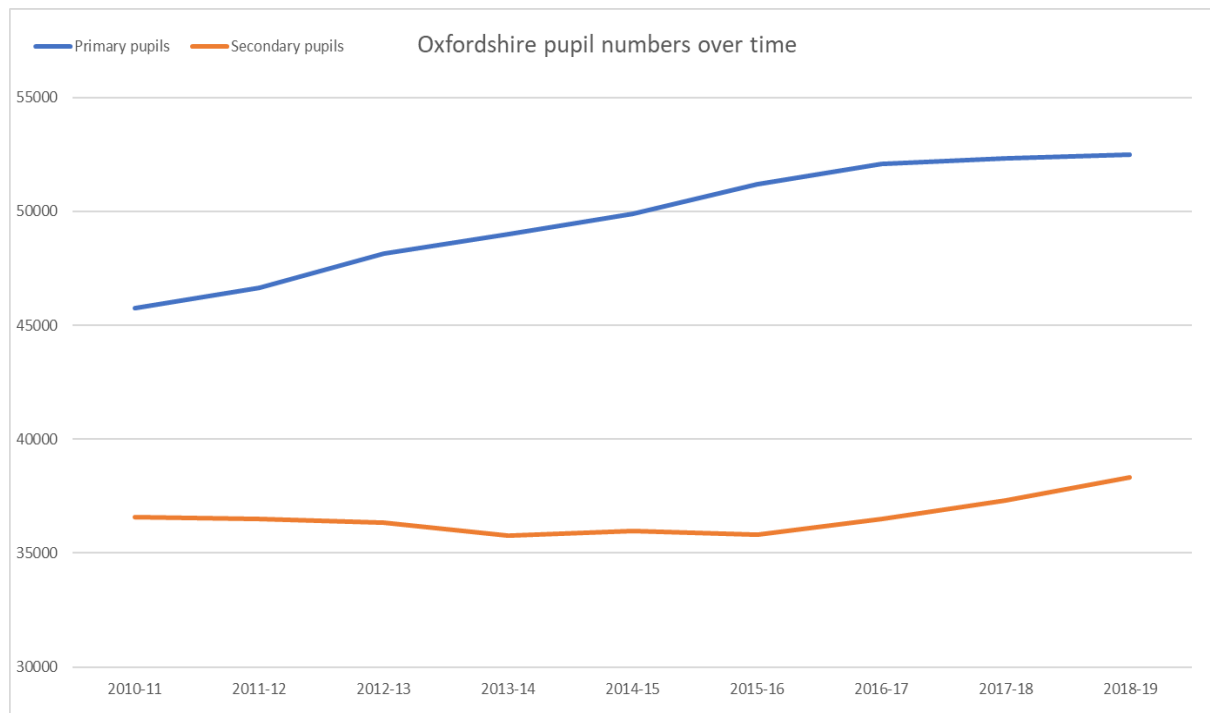
- i. Undertake public consultation to decide the academy model to be implemented and finalise the education specification for the new academy, based on the model specification template, and to be approved by the Cabinet Member for Education & Cultural Services. Undertake an impact assessment for submission to the DfE. Notify the DfE that applications will be sought, including sending specification.
- ii. Invite initial expressions of interest (EoI) in running the school through the OCC website, as well as through direct notification of known interested parties and through such mechanisms as facilitated by the DfE. All EoIs must be submitted to the DfE who will advise of potential issues.
- iii. Assess expressions of interest against the specification and the criteria in current DfE guidance.
- iv. Invite detailed bids from three or fewer providers. When received, submit to the DfE, allowing at least 4 weeks for the DfE to provide written feedback on the capacity, capability and recent performance of each proposer, before the assessment panel.
- v. Assessment panel to include a presentation from each shortlisted bidder, and agreement of assessment against criteria. Cabinet Member to approve choice of recommended sponsor. Submit recommendation and assessments, including scoring of the proposals, to the Regional Schools Commissioner, as representative of the Secretary of State.
- vi. Await RSC decision before making any public announcement. DfE notifies successful proposer, LA and local MP; LA notifies other parties.
- vii. LA and selected sponsor develop proposal to allow a funding agreement to be approved by Secretary of State.

- viii. Should the process not identify a satisfactory sponsor at the first attempt, at the discretion of the Lead Member for Education the process could be rerun from the detailed bid stage (d) rather than beginning again with Expressions of Interest.

Further information is available from www.gov.uk in the section *School organisation: statutory guidance*.

3. PLANNING FOR GROWTH

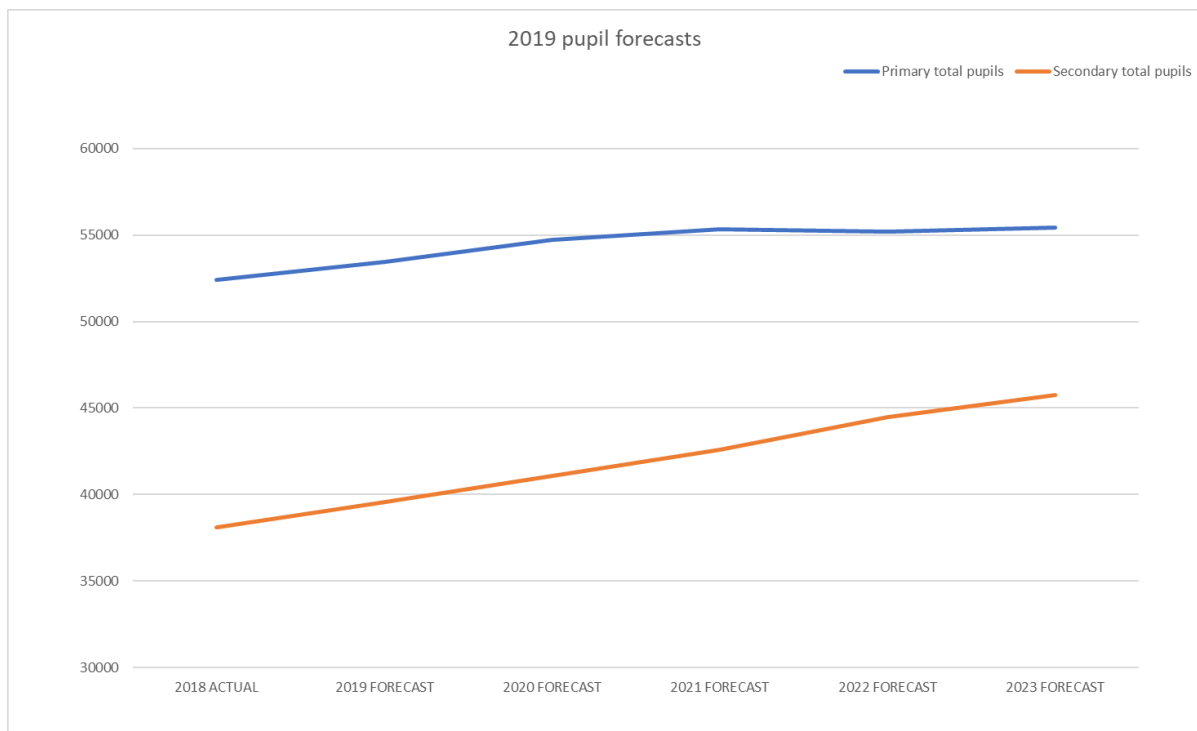
Primary school pupil numbers have been growing rapidly in Oxfordshire for several years, with the growth rate now starting to level off; secondary school pupil numbers were declining slightly to 2015, but have now started to also grow:



The number of primary pupils on roll at Oxfordshire's mainstream schools rose by 0.2% between the academic years 2017/18, and 2018/19, continuing the slowdown of growth experienced in recent years as a result of the falling birth rate. Reception numbers fell by 1.6%, the third year in a row of falling numbers, but are now expected to start to grow again as a result of large-scale housing development underway and planned across the county. Allocations for 2019 are higher than 2018.

Year 7 numbers grew by 1.9%, continuing the increase in demand for secondary school places as the increased birth rate feeds through. Total secondary pupil numbers are now also growing strongly, by 2.5% between the academic years 2017/18 and 2018/19, continuing the sustained growth as the higher numbers in primary schools are now feeding through to secondary schools. The 2019 transfer cohort is particularly large, resulting in a 5% increase in demand for Year 7 places for 2019.

Our current pupil projections show a 5.8% increase in primary pupil numbers and for secondary school pupils a 19.7% predicted rise between 2018/19 and 2023/24. Longer term, there is expected to be significant further growth due to the high levels of housing growth planned for the county.



Just over 1% of the total school population attends special schools; therefore, there is a broad correlation between special school pupil numbers and mainstream pupil numbers. The special school population is growing, and there has been particularly rapid growth in pupils attending non-county special schools.

Forecasting for special educational provision is more complicated than for mainstream schools. The percentage of pupils with Education, Health & Care Plans (EHCPs) has seen an increase between 2018 and 2019 at both the Oxfordshire level (from 2.3% to 2.5%) and the national level (from 2.9% to 3.1% - *Department for Education, Special educational needs in England: January 2019, 4 July 2019*) but the growth in total number of pupils requiring specialist provision is broadly proportional to that of mainstream pupils. However, that specialist provision could be delivered through mainstream schools, specialist resource bases/SEND units within mainstream schools, maintained special schools or in the independent and non-maintained sector, depending on pupils' specific needs and on the availability of places. Nationally and locally there has been a trend in recent years, especially for secondary pupils, towards a higher percentage of pupils with EHCPs being educated in special schools rather than mainstream, and an increased dependence on independent and non-maintained schools due to a shortage of suitable maintained school places. Pupil numbers in Oxfordshire's maintained special schools therefore depend not only on population changes, but also on changes in SEND policy and the availability of places, and will be affected by the actions planned under the new SEND Sufficiency Strategy.

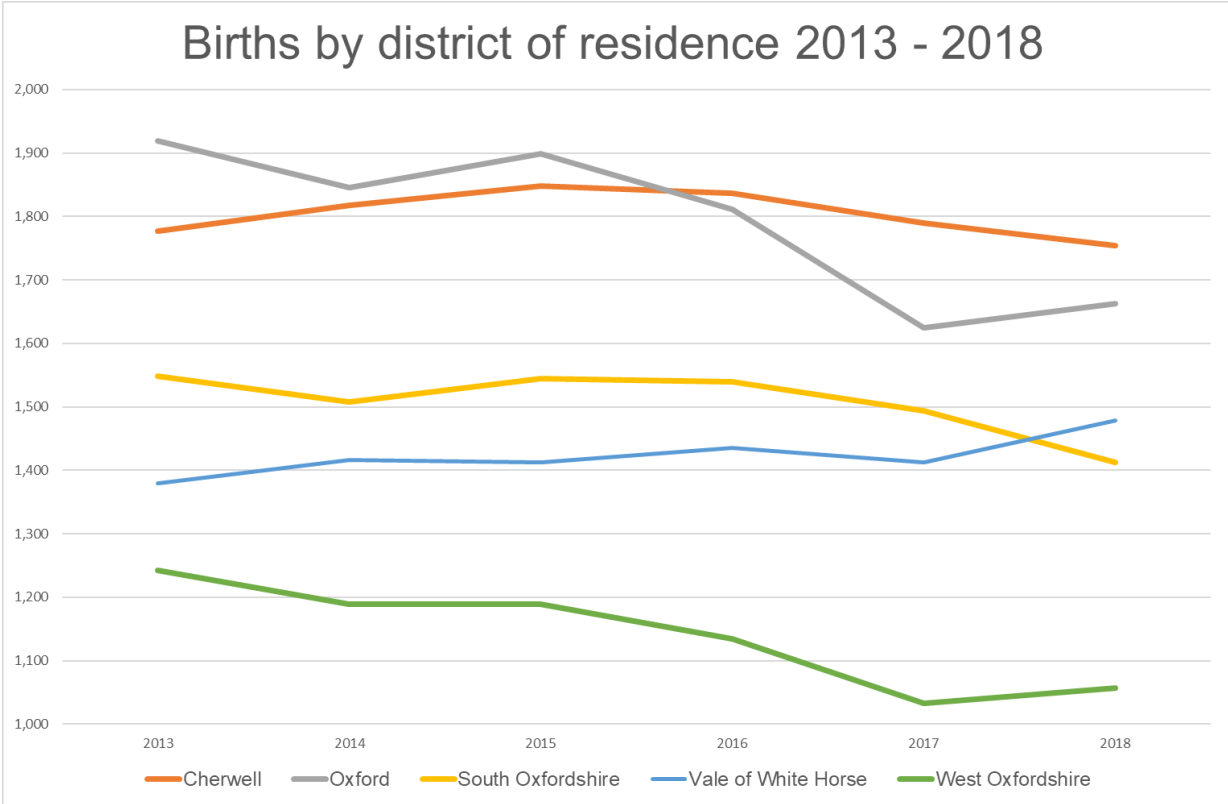
3.1 Factors affecting demand for school places

Future demand for places is considered below in the context of six main factors: fertility and birth rates; migration; housing growth; troop movements in and out of the county; changes in the pattern of participation in state sector education; and cross-boundary movement.

Factors affecting the demand for school places generally also affect demand for early education and childcare places. In addition, the entitlement to free early education for children aged 2 is targeted at the most disadvantaged children. The main eligibility criterion is the family’s economic circumstances, so it can be expected that there will be some fluctuations in the number of eligible children, reflecting the general economic climate and the employment market. There may also be changes in government policy which affect demand for places, for example the extension of free early education entitlement.

Fertility and birth rates

Following a decade of rising births, culminating in a particularly large cohort starting primary school in September 2015 (and reaching secondary school in 2022) there has since been a fall in births in Oxfordshire. However, births in 2018 (the last full year for which data is available at the time of this Plan) stabilised, and in some areas rose slightly. The pattern is not consistent either between districts or at a smaller scale: differences between MSOAs and across towns suggest that the divergence of birth rates is likely to be related to large-scale housing development in some areas attracting young families.



This divergence of births has resulted in very different pressures across the county, with some areas still seeing rising demand for primary school places and others seeing sharp falls.

Migration

In addition to changes in birth numbers, some parts of the county experience significant internal and international migration effects, increasing volatility in school populations.

Over the ten years to 2018, there was a net international inflow of population into Oxfordshire, over two thirds of which was into Oxford city. For internal (within UK) migration, there was a net movement out of Oxford, and until 2016 Cherwell, and a net inflow to South Oxfordshire, West Oxfordshire and Vale of White Horse. Net migration into Cherwell and Vale of White Horse rose markedly in the last two years, which correlates with where the bulk of new housing has been over that time period. In general, there is a pattern of families moving out of Oxford city into surrounding districts.

Inward migration of pupils not only adds to the pressure at the normal point of school admission, but also for “in-year” transfers to local schools. In previous years when there were some spare places in schools, these in-year applications could be accommodated, but increasingly families moving into a new area are finding that the nearest school has no available places.

Migration effects are difficult to forecast. The Office for National Statistics publishes regular updates on national and local area migration, but the survey methodology used has changed several times and the 2011 Census revealed estimates of international migration were significant underestimates.

Troop movements in and out of the county

Census data show that in 2011 there were an estimated 5,840 members of the Armed Forces resident in Oxfordshire, and 2,824 “associated residents” between the ages of 0 to 15 years. A sizable portion of Oxfordshire school children are therefore from Armed Forces families. The highest concentration is in the Vale of White Horse, where an estimated 5% of 0-15 year olds are from Armed Forces families.

Troop movements can have significant effects on pupil numbers in several areas within Oxfordshire, particularly around Carterton, Bicester, Abingdon and Didcot. The impact can also be felt more widely, for example with the relocation of personnel from RAF Lyneham to RAF Brize Norton, where, due to insufficient military accommodation being available in Carterton, families were dispersed over a wider area, causing pressure on school places in towns such as Faringdon and Watchfield. The county council continues to liaise with the Ministry of Defence (MoD) in relation to future troop movements in the county

Housing growth

Oxfordshire’s component councils are working together to deliver approximately 100,000 new homes across the county between 2011 and 2031 to address the severe housing shortage and expected economic growth. Oxfordshire comprises 5 districts, and their current Local Plan status is summarised below. For each planning area, the relevant district(s) are identified. The current pupil forecasts do not include

housing numbers in not-yet adopted Local Plans, unless they are already permitted sites.

Oxford's Core Strategy for Growth to 2026 was approved by the Secretary of State in autumn 2010, and sets out the intention to provide at least 8,000 additional dwellings in Oxford city between 2006 and 2026. Of these, approximately half had been built by 2018, with an increase in the delivery rate over the last five years to nearly 500 completions in 2017/18. Examination is underway into a new Local Plan 2016-2036 which will replace the Core Strategy. The Plan proposes at least 8,620 new homes to be built in Oxford over the plan period 2016-2036. This delivery target is based on the council's assessment of the city's capacity to accommodate additional housing, and would not fully meet the objectively addressed need for Oxford, currently estimated as requiring around 1,400 homes per year. The need for, and capacity to deliver, housing within the city will be matters addressed in the Plan's examination. The City Council is working in partnership with the other Oxfordshire authorities through the Oxfordshire Growth Board to address its unmet housing needs, which will require significant additional housing growth in the surrounding districts.

The **Cherwell** Local Plan 2011-2031 was adopted in July 2015. The Plan focuses most housing growth on the large towns of Bicester and Banbury, and a strategic development site at Heyford. Since 2015 over 1,300 new homes per year have been completed in the district. Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need, across sites at North Oxford, Kidlington and Begbroke/Yarnton and Woodstock. The Planning Inspector issued a preliminary advice note in July 2019, proposing modifications to the Plan, including the deletion of the Woodstock allocation. CDC will be carrying out further work to respond to this, and hope to submit a modified Plan by the end of 2019.

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027. Over half of these had already been built by 2012, since when the average delivery rate has been over 600 new homes per year. The Strategy concentrates planned housing growth on Didcot, Thame, Wallingford and Henley, and also allocates 1,154 homes across 13 larger villages. The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, including a further seven strategic housing sites and increased housing numbers in some town and village locations. Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October 2019 to recommend withdrawing the emerging South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold.

The **Vale of White Horse** (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for 'at least' 20,560 homes, delivery of which has accelerated rapidly over recent years, with over 1,600 completions in 2018. On 9 October 2019, the council voted to adopt their Local Plan Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to

include 2,200 as its contribution towards addressing Oxford's Unmet Need. The current pupil forecasts include only the housing numbers in the previously adopted Local Plan Part 1 and not the increases now included in the Local Plan Part 2, unless they are already permitted sites.

The **West Oxfordshire** Local Plan 2031 was accepted by the Planning Inspectorate in August 2018, and was adopted by the Council in September 2018. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011 – 2031, including 2,750 as a contribution towards Oxford's unmet housing need. The plan focuses most housing growth on Witney, Carterton, Chipping Norton and Eynsham, with smaller scale growth at Woodstock and smaller towns/villages. Over the last two years, over 500 homes per year have been completed, and this is now expected to accelerate as the Plan is implemented.

There are a number of new schools and school expansions planned to support the anticipated growth in the residential population which are referred to in this document. The county council continues to work closely with the district planning authorities to identify the impact on school places of the housing growth planned.

Changes in the pattern of participation in state school education

The statutory age of participation in education increased to 17 from 2013 and to 18 years from 2015. The requirement is that all young people remain in education or employment with training up to the age of 18. This has resulted in some increase in pupils staying at school post-16, and has been particularly noticeable in the SEND sector.

Economic conditions can also affect the percentage of children educated in the state sector rather than independent schools. This appears to affect some schools more than others: in particular, small village schools in affluent areas have reported that previous patterns of children transferring from the state to independent sector at key ages have changed.

Cross-boundary movement

Oxfordshire schools do not operate in isolation. Some Oxfordshire residents choose schools outside the county, and some non-Oxfordshire residents choose Oxfordshire schools. In some cases, this is because their nearest school is in a different county, and some secondary schools formally meet the needs of non-Oxfordshire families either through having non-Oxfordshire partner primary schools, or having designated areas which extend into other counties. In other cases, cross-boundary movement will be as a result of school preferences, including for selective/non-selective schools, faith schools, or other specialisms.

At **primary** level, imports and exports of pupils broadly balance. Most inward net movement of pupils is from Reading (adjoining Henley & Sonning Common planning areas) and most outward net movement is to Northamptonshire (adjoining Bicester, Banbury and Bloxham planning areas). Other areas which can be affected by net inward movement are: Banbury, Bloxham & Chipping Norton planning areas where there is movement of pupils from Warwickshire; and Faringdon planning area where there is movement of pupils from Swindon. Other areas which can be affected by net

outward movement are: Bicester, Wheatley and Thame planning areas where there is movement of pupils to Buckinghamshire; and Chipping Norton, Burford and Faringdon planning areas where there is movement of pupils to Gloucestershire.

At **secondary** level, Oxfordshire is a net importer to the extent of around 1.6% of the school population. Most inward net movement of pupils is from Buckinghamshire (adjoining Bicester, Wheatley and Thame planning areas, mostly affecting Lord William's School in Thame), which is largely related to selective education in Buckinghamshire, and from Reading (adjoining Henley & Sonning Common planning areas), mostly related to a shortage of secondary school places in north Reading. There are also smaller net inflows from W Berks (adjoining Faringdon, Wantage, Didcot, Wallingford, Woodcote and Sonning Common planning areas) and Swindon (adjoining Faringdon planning area). Most outward net movement is to Northants from the NE of Oxon (adjoining Bicester, Banbury and Bloxham planning areas); to Warwickshire (adjoining Banbury, Bloxham & Chipping Norton planning areas); and to Gloucestershire (adjoining Chipping Norton, Burford and Faringdon planning areas).

For special education, Oxfordshire is also a net importer to the extent of around 1.3% of the special school population.

3.2 School forecast methodology

Purpose

The purpose of forecasting pupil numbers is to satisfy statutory obligations to meet Basic Need (demand for additional school places) and to assess the extent to which a surplus or deficit of places is likely to exist throughout the county in the future.

Pupil numbers in Oxfordshire schools are closely monitored. Schools are required to complete a return for the Department for Education (DfE) each October (prior to 2012 this was in January) which gives a comprehensive description of numbers of pupils on roll: the School Census. This is followed up by further, shorter returns in spring and summer.

Summary pupil forecasts are published in this Plan at the planning area level (with detailed planning area forecasts provided in the Annex). Pupil forecasts for primary and secondary schools are submitted to the DfE each summer for the purposes of informing Basic Need funding allocations. These have to be provided at planning area level, where planning areas correspond to the areas in this Plan with one exception: for secondary pupils, Carterton and Burford planning areas are combined for the purposes of the DfE return, due to the close geographic relationship between these two areas. In this plan, however, the two forecasts are shown separately.

The DfE does not require forecasts for special schools or nursery schools. Oxfordshire estimates future demand for special school places for the purposes of informing capital planning. No forecasts are currently prepared specifically for nursery schools, but demographic forecasts and other data sources are used to monitor expected demand for early education places.

Forecasts are updated annually, and are based on School Census data, population forecasts (which include planned housing development) and recent patterns of

parental choice. The primary school forecasts produced are currently projections of pupil numbers as of September each school year – not all Reception children will have started school by then, so numbers may eventually rise. (Although places are offered to all children from the autumn term after their fourth birthday, parents are entitled to defer their child's entry until later in the year). The secondary school forecasts are also projections of pupil numbers as of September each year.

The forecasts show the expected demand for places in each area. There are circumstances where forecast demand cannot be met within that area, for example:

- Schools within that area may not be physically capable of expansion.
- More cost-effective solutions for meeting the additional demand for places, including through expanding capacity, may be available at nearby schools in neighbouring areas.
- Schools which are their own admissions authorities, such as VA schools and academies, cannot be required by the local authority to expand.

In some cases, therefore, the supply of school places to meet forecast demand may eventually be through schools in other areas.

Methodology

Stage 1: Population forecasting

The pupil forecasting process uses the council's own housing-led population forecasts, created using an in-house tool developed by the council. The council's population forecasts use data on fertility, mortality, and migration from the Office of National Statistics (ONS), the ONS's own mid-year population estimates, and housing development plans from the five district councils to forecast population for districts and Middle Layer Super Output Areas (MSOAs). Additional data is drawn from the ONS Statistical Population dataset (to help with estimating the population of Oxford, due to problems with ONS estimates for university cities), and household representative rate data from the Local Plan Expert Group. Other data used specifically for school place planning are the school census and allocation data received from the county admissions service.

This methodology does not involve matching population type to specific housing type built, since local plans only forecast total housing supply (not type). When individual housing development proposals are assessed, housing type is considered, as detailed below.

The housing included in each area's forecast is listed in the relevant section of this Plan. In some cases, there will have been further planning applications since the calculation of these forecasts. Such housing may not be shown in this plan; the School Organisation team however will be aware, as they are consulted on all planning applications for new housing development of 10 or more homes.

Stage 2: Primary schools

School Census data is used to identify patterns of how many children from each MSOA attend each school. By linking this data with the demographic forecasts, we

can forecast the number of 4-year-olds starting at each primary school, based on proportions coming from each MSOA and from out of county.

The census is also used to track patterns of how each cohort at each school rises or falls year-on-year as families move in or out of the area, or children move to different schools.

Combining the demographic forecasts with School Census data in this way results in draft pupil forecasts, which are then compared to the latest actual applications and allocations data, and where necessary adjusted, for example where recent changes in parental preference may not be fully reflected in past trends.

Stage 3: Secondary Schools

We use school census data for the previous year to match each pupil's primary school to their subsequent secondary school using their unique pupil number. This enables us to establish the proportion of pupils moving from each primary to each secondary, as well as the proportion coming to each secondary from elsewhere. We then apply these proportions to the projected numbers of Year 6 pupils (10-year-olds) from the primary forecasts.

Again, the census is used to track patterns of how each cohort at each school changes year-on-year, including the percentage of pupils staying on into the sixth form, where these exist. The draft pupil forecasts are then compared to the latest actual applications and allocations data, and where necessary adjusted.

The final forecasts will present a set of pupil figures which runs in line with the background population forecast for the county and which uses recent intake patterns. Where new schools are planned, population growth is allocated to existing schools until the point of opening any new establishments. Individual school forecasts can therefore be distorted where there is due to be a new school, but the planning area forecast should correctly reflect the expected impact of new housing.

A number of situations can complicate the forecasting process:

- Housing development – see below.
- A school may suddenly gain or lose in popularity because of a change in circumstances at the school or in its surrounding area. Sometimes these changes can be seen before they occur but this is not always possible.
- The number of pupils in schools associated with MoD establishments is always difficult to predict because of the movement of regiments and squadrons. Often planned movements can be delayed and there can be uncertainty over the numbers of children involved.
- Migration is a further unpredictable factor and often manifests as unpredicted fluctuations in demographic projections.
- Changes in legislation for which demand cannot be objectively calculated, for example, the rise in age of participation in education or training.

Housing development and pupil forecasting

The forecasts shown in this Plan should be treated only as a first estimate for the purposes of identifying the impact of new housing. The demographic forecasts

underlying the pupil forecasts are based on district planning authorities' expectations of housing development. There is good liaison between the county council and planning departments of district councils; however, changes in economic climate and other issues can result in developers changing the rate and type of build at short notice which is difficult to predict and track. Moreover, data on housing projections at this level does not always include a breakdown of the type and size of houses, and therefore the methodology does not involve matching population type to specific housing type built.

In cases of significant housing development Oxfordshire uses its PopCal-10 tool to produce specific population profiles based on the proposed type and timing of housing.

The PopCal-10 tool was developed by Oxfordshire County Council based on data from past housing developments within each district council, and has been validated by the Oxfordshire Data Observatory. It uses data from the 2008 survey of new housing (including age profile and occupancy rates). The profile is created from a series of parameters about the development including:

1. location of the development (by district council area)
2. total number of dwellings
3. number of dwellings by size (number of bedrooms)
4. number of dwellings by tenure (market or affordable)
5. expected phasing (number of dwellings completed (and assumed occupied) for each year of the development).

The population calculator uses this population profile to estimate the number of people at the development falling within various age ranges, which in turn is used to assess the quantum of demand on infrastructure and services, including the number of children likely to need places in local authority maintained schools.

3.3 Expansion of school capacity

Where applications for school places exceed the combined admission numbers of schools in that area, then additional school places need to be provided. If the shortage of places is expected to be temporary, it may be sufficient for one or more schools to admit above their usual admission number into "bulge" classes – either using existing accommodation or in temporary accommodation. If the shortage of places is forecast to be sustained, a permanent expansion of capacity will be required, either through new schools or expansions of existing schools.

New schools are likely to be more appropriate where there is a localised and relatively predictable permanent increase in demand, for example within major housing developments. Where the increase in demand is more dispersed, for example a general underlying increase in the population, expansions of existing schools are likely to be more appropriate. However, the needs of each planning area are assessed and reviewed individually.

Expansion of existing schools

In many cases, expanding existing schools can create additional capacity more quickly than building new schools, and at a lower cost. Extensions of existing schools can also provide opportunities to provide added value through addressing existing accommodation issues and increasing the financial sustainability of schools.

When choosing which school should expand, a number of decision-making criteria will be considered, including:

- **Popularity:** the county council seeks to ensure a high percentage of parents can secure a place at their first preference school.
- **Location:** to allow the option of children walking or cycling to school, it is preferable for children to be able to attend a school no more than 2 miles (for infant children) or 3 miles (for older children) from home.
- **Quality of provision:** expansion of successful, high attaining schools supports the council's commitment to improving educational outcomes, and is in line with DfE expectations.
- **Effective organisation of schools:** where possible, expansion which moves schools towards being able to teach in single age classes is preferred.
- **Choice and diversity:** church schools and academies are considered equally with local authority maintained schools for expansion.
- **Existing accommodation and site area:** in some cases, a school's existing accommodation may already support a higher number of pupils (for example, it may have a large hall, or a large total site area).
- **Feasibility of expansion:** the cost of expanding a school will be affected by their current layout of accommodation.

Local consultation will inform the decision to expand a school. Section 2.3 above sets out the decision-making processes for expanding existing schools.

New schools

In areas of significant population growth, usually related to large scale housing development, new schools may be a more appropriate method of increasing school capacity than school expansions. Section 2.3 above sets out the decision-making processes for establishing new schools.

Since 2013 Oxfordshire has seen the opening of a new SEND school in Oxford; two studio schools and a UTC; two all-age schools (one bilingual); two secondary schools and five primary schools. These mark the start of a prolonged programme of new schools planned for Oxfordshire, opening either through the LA presumption route or through "wave" bids directly to the DfE.

Schools planned as a result of already adopted Local Plans or other confirmed growth:

Location	Type of school	Opening date	Sponsor
Whitelands Academy, South West Bicester	Secondary school, 600 places, 11-16	2020 (subject to final approval by Secretary of State)	White Horse Federation
Cherry Fields Primary School, Banbury (Southam Road)	1 form entry primary school, 3-11	2020 (subject to final approval by Secretary of State)	GLF Schools
Bloxham Grove Academy	100-place special free school, 7-19	2020/2021 (subject to final approval by Secretary of State)	The Gallery Trust
Barton Park Primary School, Oxford	1.5 form entry primary school, 3-11	2020 (subject to final approval by Secretary of State)	Community Schools Alliance Trust
GEMS Wantage Primary Academy, NE Wantage (Kingsgrove/ Crabhill)	2 form entry primary school, 2-11, being built by housing developer	2020 (subject to final approval by Secretary of State)	GEMS Learning Trust
Windrush CE Primary School, West Witney	1.5 form entry primary school, 2-11, able to grow to 2 form entry, being built by housing developer	2021 (subject to final approval by Secretary of State)	River Learning Trust
Graven Hill, Bicester	2 form entry primary school, 2-11, able to grow to 3 form entry, being built by housing developer	2021 (subject to final approval by Secretary of State)	The Warriner Trust
Grove Airfield	All-through 2-16 free school with 2 form entry primary and 4 form entry secondary (subject to final approval by Secretary of State)	2023 (tbc)	Vale Academy Trust
Didcot	SEN school, 100 pupils	2023 (tbc)	Academy Sponsor process underway
Didcot North East	Two 2-form entry primary schools with nursery classes and a secondary school	First primary school expected 2023	Academy sponsor process expected to run during 2021.
South West Bicester	Up to 2-form entry primary school with nursery classes	2023 (tbc)	
North Abingdon	Up to 2-form entry primary school with nursery classes	Housing dependent, not expected before 2023	

Location	Type of school	Opening date	Sponsor
Didcot Valley Park	Two 2-form entry primary schools with nursery classes	Housing dependent, not expected before 2024	Academy sponsor process expected to run during 2022.
East Carterton	1-form entry primary school with nursery classes	Housing dependent, not expected before 2024	
Banbury, Salt Way	2-form entry (or larger) primary school with nursery classes	Housing dependent, not expected before 2024	
Eynsham	2-3 primary schools with nursery classes, size dependent on population growth	Housing dependent, first school currently expected to be required by 2025	To be decided
South East Bicester	2-form entry primary school with nursery classes	Housing dependent, not expected before 2025	To be decided
North West Bicester	2 or 3 more primary schools with nursery classes, dependent on housing growth, and a secondary school	Housing dependent, current forecasts indicate next schools needed mid/late 2020s	To be decided
Banbury	Secondary school, size dependent on population growth	Housing dependent, current forecasts indicate mid/late 2020s as long as Blessed George Napier is able to expand	To be decided
Grove Airfield	2-form entry primary school with nursery classes	Housing dependent, current forecasts indicate late 2020s	To be decided
Didcot North West Valley Park	One primary school with nursery classes, size dependent on population growth	Housing dependent, not expected before late 2020s.	To be decided
Witney – north/east	1 primary school with nursery classes, size dependent on population growth	Housing dependent, current forecasts indicate late 2020s	To be decided
Chipping Norton	1 primary school with nursery classes, size dependent on population growth	Housing dependent, current forecasts indicate late 2020s	To be decided
Kingston Bagpuize/Southmoor	1 primary school with nursery classes	Housing dependent, current forecasts indicate late 2020s	To be decided

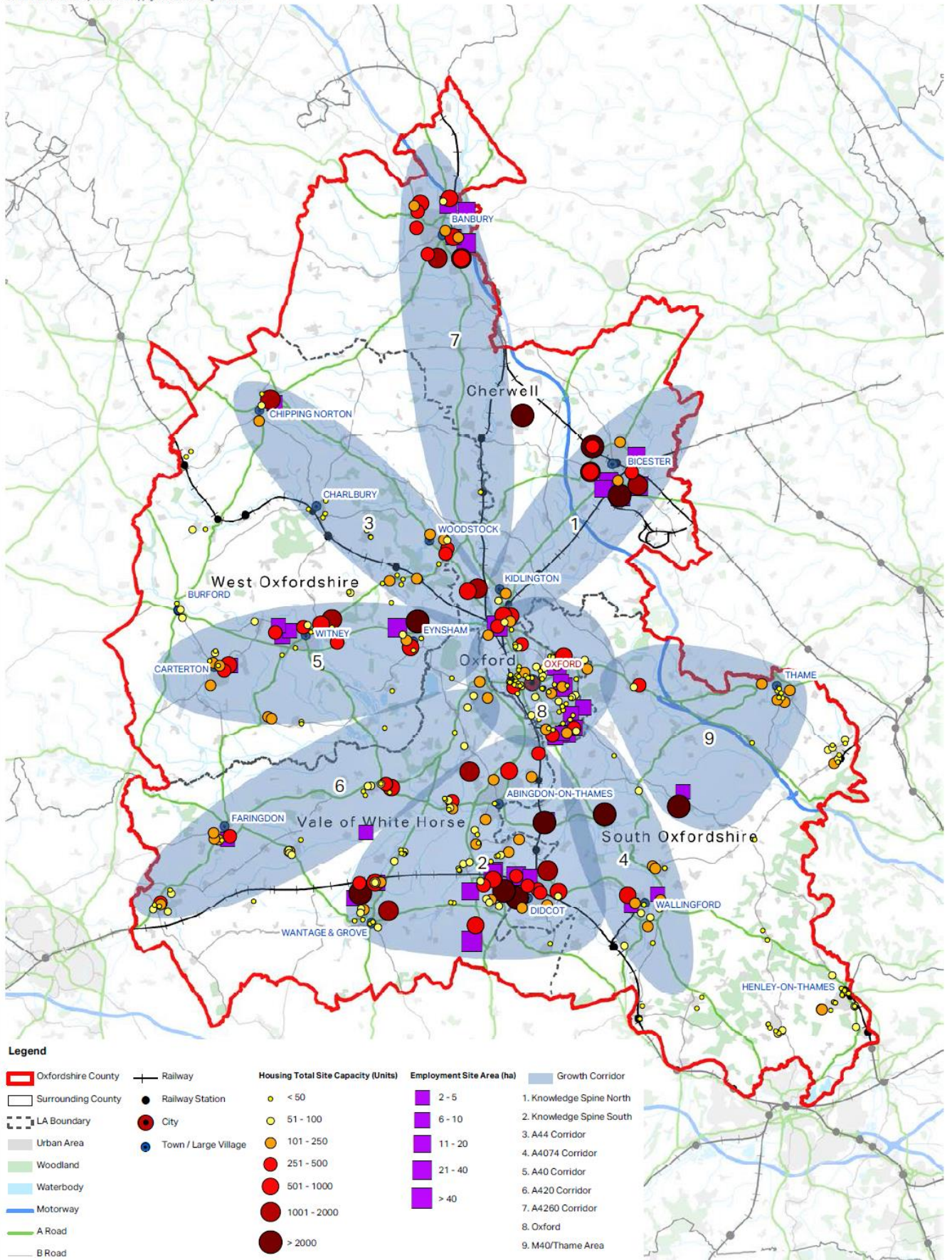
Further new schools are expected to be needed as a result of the higher levels of housing growth now proposed in Local Plans. These will be confirmed once Local Plans are finalised, but proposals so far consulted on would require the following additional new schools:

Location	Type of school	Comment
Cherwell's Oxford Unmet Need sites	2-3 primary schools with nursery classes and possible secondary school	Cherwell Local Plan Partial Review/Part 2, subject to approval/adoption.
Abingdon – Dalton Barracks	1 primary schools with nursery classes in the first instance	VOWH Local Plan Part 2, subject to approval/adoption. Could be more growth beyond 2031.
Culham	2 primary schools with nursery classes	Proposed in SODC updated Local Plan, now on hold pending a decision on planning in SODC
Berinsfield regeneration	1 primary school with nursery classes	Proposed in SODC updated Local Plan, now on hold pending a decision on planning in SODC
Chalgrove Airfield	2 primary schools with nursery classes	Proposed in SODC updated Local Plan, now on hold pending a decision on planning in SODC
Abingdon area	Secondary school(s)	At least one new secondary school likely to be needed in Abingdon-Chalgrove arc as a result of combined growth in VOWH and SODC, now on hold pending a decision on planning in SODC

Other new schools may also be approved by the DfE, in addition to, or instead of, those shown above, in response to “wave” applications (see Section 2.3 above).

Major planned growth areas in Oxfordshire

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3.4 Funding of school growth

The county council aims to join up different funding streams for schools to ensure effective and efficient use of resources.

Government funding

Government funding for school places is mainly through annual “Basic Need” allocations. These are based on data collected from local authorities in the annual School Capacity Survey (SCAP). This collects information on the capacities of schools in each planning area (as shown in this Plan), and local authorities’ forecasts of pupil numbers for several years ahead. Special schools are not included.

Basic Need funding is allocated on the basis of a comparison of forecast mainstream pupil numbers with mainstream school capacity in each planning area, with shortfalls in capacity attracting funding. Adjustments are made to account for school places for which central government funding has already been provided, including through free schools, or which will be funded from developer contributions, where they are not yet fully reflected by the data collected through SCAP.

For the 3-year period 2018/19– 2020/21, Oxfordshire has been allocated £27,180,572 in Basic Need funding.

Additional government funding for school places is sometimes made available through ad hoc bidding rounds or grants. This includes the special provision fund allocations announced on 4 March 2017, which are to support local authorities to make capital investments in provision for pupils with special educational needs and disabilities. Oxfordshire has been allocated £4,166,883 from this fund, to be paid to the county council between 2018 and 2020, based principally on projected numbers for children and young people aged 2-18 between the years 2018/19 and 2020/21.

Academies can also submit bids to the DfE Condition Improvement Fund (CIF). This is an annual bidding round for eligible academies and sixth-form colleges to apply for capital funding. The priority for the fund is to address significant condition need, keeping academy and sixth-form college buildings safe and in good working order. This includes funding projects to address health and safety issues, building compliance and poor building condition. CIF also supports a small proportion of expansion projects. These are for academies and sixth-form colleges rated good or outstanding by Ofsted that can demonstrate a need to expand.

New academies created through applications directly to the DfE – “wave” free schools - can be an important contribution towards ensuring sufficient school places. Their capital costs are separately funded by the DfE, but this funding would be expected to result in reduced Basic Need funding in the longer term, as a result of the additional capacity they provide. Where they are to meet the needs of housing development, developers are expected to contribute towards their cost.

Housing development and funding for school places

New guidance on *Securing developer contributions for education* was published by the government in April 2019. This sets out a clear expectation that local authorities should seek developer contributions towards school places that are created to meet the need arising from housing development. Central government basic need grant, the DfE free schools programme and other capital funding do not negate housing developers' responsibility to mitigate the impact of their development on education. When the DfE free schools programme is delivering a new school for a development, the DfE expects the developer to make an appropriate contribution to the cost of the project, allowing DfE to secure the school site on a peppercorn basis and make use of developer contributions towards construction. There should be an initial assumption that both land and funding for construction will be provided for new schools planned within housing developments.

Oxfordshire's Access to Learning team is consulted on all significant housing developments, and advises on the likely impact on local schools, and the measures which would be required from developers in mitigation. Typically, this will include seeking financial contributions towards the cost of expanding local schools, if there are not expected to be sufficient places available.

New residential development is also expected to increase demand for early education places. Developer contributions will be sought towards increasing capacity in the early education market, either through expanding existing provision or through new facilities. Where larger developments are required to provide new primary schools, it is expected that these schools will include nursery classes for the 2-4 age range. It may also be necessary for large housing developments to incorporate into any community facilities provided accommodation suitable for delivery of additional early education and childcare by the private, voluntary or independent sector.

There are now two types of developer contributions relevant to school capacity - Section 106 (S106) contributions and the Community Infrastructure Levy (CIL).

S106 contributions are subject to legal restrictions under the Community Infrastructure Levy Regulations 2010, and can only be required if they are:

- necessary to make the development acceptable in planning terms;
- directly related to the development;
- fairly and reasonably related in scale and kind to the development.

Contributions cannot be required if, even with the development, there would still be spare school places. Developers cannot be required to pay for improvements which are not related to their development. From September 2019, the "pooling limit" of a maximum of five S106 agreements towards each infrastructure project has been lifted, allowing the cost of infrastructure to be spread across more developments.

S106 contributions are paid directly to the county council to enable it to meet its statutory duty to secure sufficient school and early years places. The county council, working with local schools and providers, will identify the most appropriate way to increase capacity to meet the needs of the development.

The Community Infrastructure Levy is also operational in Oxford City, South Oxfordshire and Vale of White Horse, and may be introduced in the other districts in

due course. Under the CIL, charges are set by the district council, based on the size and type of the new development. The money raised from the community infrastructure levy can be used to support development by funding infrastructure that the council, local community and neighbourhoods want, like new or safer road schemes, park improvements or a new health centre. The precise details of how CIL works in each area are determined by the relevant district councils. The county council works closely with each district council to identify the school infrastructure required as a result of development, and how it can best be funded.

The operation of CL has been amended by regulation 11 of The Community Infrastructure Levy (Amendment) (England) (No. 2) Regulations 2019, which omits regulation 123 of the Community Infrastructure Levy Regulations 2010 so there is now no legislative restriction on planning obligations being sought towards infrastructure and projects that are on a Planning Authority's Regulation 123 List. The practical effect of this is that, even if a CIL authority lists education as one of the types of infrastructure on which CIL can be spent, it is now possible to also seek a S106 contribution where the three "CIL tests" are met, and it is the county council's expectation to seek such funding for additional school capacity where this is necessary to meet the needs of housing development.

4. SCHOOL PLACE PLANNING DATA

This section of the plan indicates the following information for each school planning area:

- Primary school capacities, pupil numbers and forecasts.
- Secondary school capacities, pupil numbers and forecasts.
- Nursery school places.
- Early years sufficiency
- Future (potential) housing developments.
- Long-term planning implications.

The school place planning data is set out in this document following the alphabetical order of school planning areas as listed below.

- Abingdon
- Banbury
- Bicester
- Bloxham
- Burford
- Carterton
- Chipping Norton
- Cumnor
- Didcot
- Eynsham
- Faringdon
- Henley
- Kidlington
- Oxford
- Sonning Common
- Thame
- Wallingford
- Wantage
- Watlington
- Wheatley
- Witney
- Woodcote
- Woodstock

Glossary

TERM	DEFINITION
School code	Also known as the “DfE number” this is a number unique to each school and is used for identification purposes.
Type of school	
COM	Community: the local authority owns the school’s land and buildings, funds the school and employs the staff, but the governing body is responsible for running the school.
VC	Voluntary Controlled: mainly religious or “faith” schools. Some/all of the land and buildings are usually owned by a charitable trust, which also appoints some members of the governing body, but the local authority funds the school and employs the staff.
VA	Voluntary Aided: mainly religious or “faith” schools. The land and buildings are usually owned by a charitable trust. Capital works are funded by the Diocesan Board of Education. The governing body employs the staff and sets the admissions criteria.
FT	Foundation Trust: Foundation schools are run by their own governing body, which employs the staff and sets the admissions criteria. Land and buildings are usually owned by the governing body or a charitable foundation. A Trust school is a type of foundation school which forms a charitable trust with an outside partner - for example, a business or educational charity.
ACA	Academy: Academies are publicly-funded independent schools, operating outside the local authority framework, accountable directly to the Secretary of State. The Pupil Place Plan may not hold all the information for Academies that it does for other types of school, as Academies are not obliged to provide this for the county council. Schools can choose to convert to academies at any time of the year, and more schools may have converted since the publication of this Plan. An up-to-date list of schools which have started the conversion process is available from the Department for Education website (www.education.gov.uk). This plan includes data as at 1 May 2019; it will not show schools still at the informal consultation stage.
Free School	The term “free school” was initially used for non-profit making, independent, state-funded academies set up since 2010 by a wide range of proposers – including charities, universities, businesses, educational groups, visionary teachers or committed parents - in response to demand within a local area for a greater variety of schools, but outside of local authority school planning processes. Since May 2015, “free school” has broadened to become the

<p>STU</p> <p>UTC</p>	<p>DfE’s term for any new provision academy, including those resulting from the local authority-led “presumption” process. To reflect this change, free schools are now shown as “ACA” in this plan.</p> <p>Studio school: Small schools for 300 students. With year-round opening and a 9-5 working day, they feel more like a workplace than a school. Working closely with local employers, Studio Schools will offer a range of academic and vocational qualifications including GCSEs in English, Maths and Science, as well as paid work placements linked directly to employment opportunities.</p> <p>University Technical College: These specialise in subjects that need modern, technical, industry-standard equipment such as engineering and construction, teaching these disciplines alongside business skills and the use of ICT. They are sponsored by a local university and employers, and often work in partnership with FE colleges and established academy trusts. They are usually for 500-800 students.</p>
<p>Nursery places Part Time Equivalent (PTE)</p>	<p>Nursery places are for pre-Reception 4-year olds or younger.</p> <p>School nursery capacity is always shown in part time equivalent places with 1 PTE place equalling 15 hours a week, term time only. Schools may however offer both universal and extended entitlement places. An extended entitlement place would take up 2 PTE of capacity.</p>
<p>Published Admission Number (PAN)</p>	<p>This is the maximum number of pupil places which MUST be offered if there are enough applications. For primary schools this is for 4-year-olds. For secondary schools there is an admission number for Year 7 pupils and may be a separate admission number for Year 12 (“Sixth Form”) pupils; the latter is set by the governing body, and not shown in this Plan. Schools can agree to admit more than this number.</p>
<p>Reception pupils 2018/19</p>	<p>Number of pupils in Reception class(es) on the school roll as at May 2019. Reception is the first year group in a primary school, for children of compulsory school age of 4 or 5. Comparing this to the PAN shows how full the school is in the youngest year group.</p>
<p>Year 7 pupils 2018/19</p>	<p>Number of Year 7 pupils (the first year of secondary school) on the school roll as at May 2019. Comparing this to the PAN shows how full the school is in the youngest year group.</p>
<p>Capacity of school as at May 2019</p>	<p>For non-academy schools, this is the “net capacity” assessed by a DfE methodology to show the number of pupil places available. For primary schools, the net capacity is calculated based on the number and size of spaces designated as ‘class bases’ for Years Reception - 6. Nursery classrooms are excluded from the number shown. For secondary schools, the net capacity is based on the</p>

	<p>number, size and type of teaching spaces and the age range of the school.</p> <p>Net capacity measurement at Academies is replaced by the number of places agreed as part of their funding agreement with the Secretary of State for Education.</p>
Total pupil numbers 2018/19	Number of pupils in Reception to Year 6 (primary schools) or Year 7 to sixth form (secondary schools) on the school roll as at May 2019. Nursery pupils are not included. Comparing this to the capacity shows how full the school is overall.
1st preference applications for 2019/20	Number of applications received where the school is listed as the first preference by the parent(s) / guardian. This is an indication of how popular the school is. If this is higher than the published admission number, the school is over-subscribed.
Allocation for September 2019 (at July 2019)	This is the number of places allocated for children arriving at primary school, or transferring to secondary school, in September 2019. The actual number of pupils arriving in September may be higher than this – if there were late applications – or lower – if parents do not take up the place offered (for example they move away). In some areas there can be significant numbers of late applications, particularly for primary schools.
Forecast demand for places	These are shown at the level of planning area, for the period 2019/20 - 2023/24. For primary schools, forecasts for Reception intakes are shown: comparing this to the total admission numbers in that planning area indicates whether there will be sufficient school places for each year's intake. Total primary pupil forecasts are also shown: comparing this to the total current capacities of the schools indicates overall pressure on school places. For secondary schools, the equivalent forecasts are for Year 7 and total pupils.
Nursery school	While nursery classes are included within many primary schools, there are also seven local authority maintained nursery schools, that provide a range of structured educational experiences based on learning through play for under-5s.
Resource Bases	Specialist provision for children with Special Educational Needs & Disabilities (SEND) e.g. hearing impairment or autism, based on the sites of mainstream schools.
Special schools	Schools providing education for children with Special Educational Needs & Disabilities (SEND).
Housing developments included in forecasts	The figures shown for housing developments in each area show projected numbers of houses, not numbers of children. In many areas there will have been more houses planned/permitted since the demographic forecasts underlying the pupil forecasts were calculated. These housing numbers are not shown, but the Access to Learning team will be aware of them, and take them into account when planning school capacity. Houses shown here are grouped according to Middle Layer Super Output Areas (MSOAs)

MSOA	A Middle Layer Super Output Area (MSOA) is a geographic area used for reporting small area statistics in England and Wales. Middle Layer Super Output Areas are built from groups of contiguous Lower Layer Super Output Areas
Multi Academy Trust (MAT)	All academies in a MAT are governed by one trust and a single board of directors. The board of directors is responsible for decisions relating to how each academy is run, from the curriculum to staffing. The MAT can establish a local governing body for each of its academies, to which it can delegate some of its functions. The MAT remains accountable for these functions.
Umbrella Trust (UT)	Each academy has its own trust, but all the schools in the UT can share governance and procurement of services. If a group of schools wants to convert as part of a UT, each school converts separately, but will set up an umbrella trust to join together. The schools can agree that the UT will appoint governors or members of the trusts in each of the schools, and set a joint vision.

School year groups

Age	Sector	Year Group	Stage
2–4	Early years	Nursery years	Foundation Stage
4–5	Early years	Reception year	Foundation Stage
5–7	Infant	Years 1 and 2	Key Stage 1
7–11	Junior	Years 3, 4, 5, 6	Key Stage 2
11–14	Secondary	Years 7, 8, 9	Key Stage 3
14–16	Secondary	Years 10 and 11	Key Stage 4
16-19	Sixth Form	Years 12 and 13	Key Stage 5

Alphabetical list of primary schools

Schools are organised in this plan according to their planning area, as shown below. Where planning areas have been subdivided into sub-areas, these are shown, but to avoid excessive length, the following codes have been used:

Abingdon PA1 - North
Abingdon PA2 - East
Abingdon PA3 - South
Abingdon PA4 - West

Bicester PA1 - North Town
Bicester PA2 - South East
Bicester PA3 - South West
Bicester PA4 - North Villages

Burford PA1 - North
Burford PA2 - South

Witney PA1 - North
Witney PA2 - South

Oxford PA1 - North
Oxford PA2 - East
Oxford PA3 - Central
Oxford PA4 - South

School	Planning area	Sub-area (where relevant)
Abbey Woods Academy	Abingdon	PA2 - East
All Saints Church of England (Aided) Primary School	Didcot	N/A
Appleton Church of England (A) Primary School	Cumnor	N/A
Ashbury with Compton Beauchamp CE (A) Primary School	Faringdon	N/A
Aston & Cote Church of England Primary School	Witney	PA2 - South
Aston Rowant Church of England Primary School	Thame	N/A
Aureus Primary School	Didcot	N/A
Badgemore Primary School	Henley	N/A
Bampton Church of England Primary School	Burford	PA2 - South
Barley Hill Primary School	Thame	N/A
Bayards Hill Primary School	Oxford (Headington)	PA2 - East
Beckley Church of England Primary School	Wheatley	N/A
Benson CE Primary School	Wallingford	N/A
Bishop Carpenter Church of England Aided Primary School	Bloxham	N/A
Bishop Loveday Church of England Primary School	Banbury	N/A
Bladon Church of England Primary School	Woodstock	N/A
Bletchington Parochial Church of England Primary School	Woodstock	N/A
Blewbury Endowed Church of England Primary School	Didcot	N/A

Bloxham Church of England Primary School	Bloxham	N/A
Botley School	Cumnor	N/A
Brightwell-Cum-Sotwell CE Primary School	Wallingford	N/A
Brize Norton Primary School	Burford	PA2 - South
Brookside Primary School	Bicester	PA3 - South West
Buckland Church of England Primary School	Faringdon	N/A
Bure Park Primary School	Bicester	PA1 - North Town
Burford Primary School	Burford	PA1 - North
Caldecott Primary School	Abingdon	PA3 - South
Carswell Community Primary School	Abingdon	PA3 - South
Carterton Primary School	Carterton	N/A
Chadlington Church of England Primary School	Chipping Norton	N/A
Chalgrove Community Primary School	Watlington	N/A
Charlbury Primary School	Chipping Norton	N/A
Charlton Primary School	Wantage	N/A
Charlton-On-Otmoor Church of England Primary School	Bicester	PA2 - South East
Checkendon Church of England Primary School	Woodcote	N/A
Chesterton Church of England Primary School	Bicester	PA3 - South West
Chilton County Primary School	Didcot	N/A
Cholsey Primary School	Wallingford	N/A
Christopher Rawlins CE Voluntary Aided Primary School	Bloxham	N/A
Church Cowley St James CE Primary School	Oxford (Isis)	PA4 - South
Clanfield Church of England Primary School	Burford	PA2 - South
Clifton Hampden Church of England Primary School	Abingdon	PA2 - East
Combe Church of England Primary School	Woodstock	N/A
Cropredy Church of England Primary School	Banbury	N/A
Crowmarsh Gifford Church of England School	Wallingford	N/A
Culham Parochial Church of England School	Abingdon	PA2 - East
Cumnor Church of England School	Cumnor	N/A
Cotteslowe Primary School	Oxford (Cherwell)	PA1 - North
Dashwood Banbury Academy	Banbury	N/A

Deddington Church of England Primary School	Bloxham	N/A
Dorchester St Birinus Church of England School	Abingdon	PA2 - East
Dr Radcliffe's Church of England (Aided) Primary School	Bloxham	N/A
Dr South's Church of England (Aided) Primary School	Kidlington	N/A
Drayton Community Primary School	Abingdon	PA3 - South
Dry Sandford Primary School	Abingdon	PA4 - West
Ducklington Church of England Primary School	Witney	PA2 - South
Dunmore Primary School	Abingdon	PA1 - North
East Oxford Primary School	Oxford (Isis)	PA3 - Central
Edith Moorhouse Primary School	Carterton	N/A
Edward Feild Primary School	Kidlington	N/A
Enstone Primary School	Chipping Norton	N/A
Europa School UK	Abingdon	PA2 - East
Ewelme Church of England (Aided) Primary School	Watlington	N/A
Eynsham Community Primary School	Eynsham	N/A
Faringdon Infant School	Faringdon	N/A
Faringdon Junior School	Faringdon	N/A
Finmere Church of England Primary School	Bicester	PA4 - North Villages
Finstock Church of England Primary School	Witney	PA1 - North
Fir Tree Junior School	Wallingford	N/A
Five Acres Primary School	Bicester	PA2 - South East
Freeland Church of England Primary School	Eynsham	N/A
Fringford Church of England Primary School	Bicester	PA4 - North Villages
Fritwell CE Voluntary Controlled Primary School	Bicester	PA4 - North Villages
Gagle Brook Primary School	Bicester	PA1 - North Town
Garsington Church of England Primary School	Wheatley	N/A
Gateway Primary School	Carterton	N/A
GEMS Didcot Primary Academy	Didcot	N/A
Glory Farm Primary School	Bicester	PA1 - North Town
Goring Church of England Aided Primary School	Woodcote	N/A
Great Milton Church of England Primary School	Wheatley	N/A
Great Rollright Church of England (Aided) Primary School	Chipping Norton	N/A

Great Tew Primary School	Chipping Norton	N/A
Grove Church of England School	Wantage	N/A
Hagbourne Church of England Primary School	Didcot	N/A
Hailey Church of England Primary School	Witney	PA1 - North
Hanborough Manor Church of England School	Eynsham	N/A
Hanwell Fields Community School	Banbury	N/A
Hardwick Community School	Banbury	N/A
Harriers Banbury Academy	Banbury	N/A
Harwell Community Primary School	Didcot	N/A
Heyford Park Free School	Bicester	PA4 - North Villages
Hill View Primary School	Banbury	N/A
Holy Trinity Catholic Primary School	Chipping Norton	N/A
Hook Norton Church of England Primary School	Chipping Norton	N/A
Hornton Primary School	Bloxham	N/A
Horspath Church of England Primary School	Wheatley	N/A
John Blandy Voluntary Controlled Primary School	Faringdon	N/A
John Hampden Primary School	Thame	N/A
John Henry Newman Academy	Oxford (South East)	PA4 - South
Kidmore End Church of England (Aided) Primary School	Sonning Common	N/A
Kingham Primary School	Chipping Norton	N/A
King's Meadow School	Bicester	PA3 - South West
Kirtlington Church of England School	Woodstock	N/A
Ladygrove Park Primary School	Didcot	N/A
Langford Village Community Primary School	Bicester	PA2 - South East
Larkrise Primary School	Oxford (Isis)	PA3 - Central
Launton Church of England School	Bicester	PA2 - South East
Leafield Church of England (Controlled) Primary School	Burford	PA1 - North
Lewknor (Church of England) Primary School	Watlington	N/A
Little Milton Church of England Primary School	Wheatley	N/A
Long Furlong Primary School	Abingdon	PA1 - North
Long Wittenham (Church of England) Primary School	Didcot	N/A
Longcot & Fernham Church of England School	Faringdon	N/A

Longfields Primary School	Bicester	PA2 - South East
Longford Park Primary School	Banbury	N/A
Longworth Primary School	Faringdon	N/A
Madley Brook Community Primary School	Witney	PA1 - North
Manor School	Didcot	N/A
Marcham Church of England Primary School	Abingdon	PA4 - West
Marsh Baldon Church of England Controlled School	Wheatley	N/A
Middle Barton School	Chipping Norton	N/A
Mill Lane Community Primary School	Thame	N/A
Millbrook Primary School	Wantage	N/A
Nettlebed Community School	Woodcote	N/A
New Hinksey Church of England Primary School	Oxford (Cherwell)	PA3 - Central
New Marston Primary School	Oxford (Cherwell)	PA2 - East
North Hinksey Church of England Primary School.	Cumnor	N/A
North Kidlington School	Kidlington	N/A
North Leigh Church of England Primary School	Witney	PA1 - North
Northbourne Church of England Primary School	Didcot	N/A
Orchard Fields Community School	Banbury	N/A
Orchard Meadow Primary School	Oxford (South East)	PA4 - South
Our Lady of Lourdes Catholic Primary School, Witney	Witney	PA2 - South
Our Lady's Catholic Primary School	Oxford (South East)	PA3 - Central
Pegasus Primary School	Oxford (South East)	PA4 - South
Peppard Church of England Primary School	Sonning Common	N/A
Queen Emma Community Primary School	Witney	PA2 - South
Queensway School	Banbury	N/A
Radley Church of England Primary School	Abingdon	PA1 - North
Rose Hill Primary School	Oxford (South East)	PA4 - South
Royal Air Force Benson Community Primary School	Watlington	N/A
Rush Common School	Abingdon	PA1 - North
Sacred Heart Catholic Primary School, Henley-on-Thames	Henley	N/A
Sandhills Community Primary School	Wheatley	N/A

Shellingford Church of England (Voluntary Aided) School	Faringdon	N/A
Shenington Church of England Primary School	Bloxham	N/A
Shiplake Church of England Primary School	Henley	N/A
Shrivenham CE (Controlled) Primary School	Faringdon	N/A
Sibford Gower Endowed Primary School	Bloxham	N/A
Sonning Common School	Sonning Common	N/A
South Moreton School	Didcot	N/A
South Stoke Primary School	Woodcote	N/A
Southwold Primary School	Bicester	PA1 - North Town
St Aloysius' Catholic Primary School	Oxford (Cherwell)	PA1 - North
St Amand's Catholic (VA) Primary School, East Hendred	Wantage	N/A
St Andrew's Church of England Primary School	Oxford (Headington)	PA2 - East
St Andrew's Church of England Primary School, Chinnor	Thame	N/A
St Barnabas' Church of England (Aided) Primary School	Oxford (Cherwell)	PA1 - North
St Blaise Church of England Primary School	Abingdon	PA3 - South
St Christopher's Church of England Primary School	Oxford (Isis)	PA3 - Central
St Christopher's CE Primary School, Langford	Burford	PA2 - South
St Ebbe's Church of England Primary School	Oxford (Cherwell)	PA3 - Central
St Edburg's Church of England (VA) School, Bicester	Bicester	PA3 - South West
St Edmund's Catholic (VA) Primary School, Abingdon	Abingdon	PA1 - North
St Francis Church of England Primary School	Oxford (Isis)	PA3 - Central
St Gregory the Great Catholic School	Oxford (Isis)	PA3 - Central
St James Church of England Primary School, Hanney	Wantage	N/A
St John Fisher Catholic Primary School, Oxford	Oxford (South East)	PA4 - South
St John the Evangelist Church of England Primary School	Carterton	N/A
St John's Catholic Primary School	Banbury	N/A
St John's Primary School	Wallingford	N/A
St Joseph's Catholic Primary School, Banbury	Banbury	N/A

St Joseph's Catholic Primary School, Carterton	Carterton	N/A
St Joseph's Catholic Primary School, Oxford	Oxford (Cherwell)	PA2 - East
St Joseph's Catholic Primary School, Thame	Thame	N/A
St Kenelm's Church of England (VC) Primary School	Burford	PA1 - North
St Laurence Church of England Primary School	Wallingford	N/A
St Leonard's Church of England Primary School	Banbury	N/A
St Mary's Catholic Primary School, Bicester	Bicester	PA3 - South West
St Mary's CE (Aided) Primary School, Chipping Norton	Chipping Norton	N/A
St Mary's CE (Controlled) Infant School, Witney	Witney	PA2 - South
St Mary's CE (VC) Primary School, Banbury	Banbury	N/A
St Michael's CE Aided Primary School, Oxford	Oxford (Cherwell)	PA2 - East
St Mary and St John Church of England Primary School	Oxford (Isis)	PA3 - Central
St Michael's Church of England Primary School, Steventon	Abingdon	PA3 - South
St Nicholas C of E Infants' School & Foundation Stage	Wallingford	N/A
St Nicholas CE Primary School, East Challow	Wantage	N/A
St Nicholas' Primary School	Oxford (Cherwell)	PA2 - East
St Nicolas Church of England Primary School, Abingdon	Abingdon	PA1 - North
St Peter's Church of England (VA) Primary School	Burford	PA2 - South
St Peter's Church of England Primary School, Cassington	Eynsham	N/A
St Philip and St James' CE Voluntary Aided Primary School	Oxford (Cherwell)	PA1 - North
St Swithun's Church of England Primary School	Cumnor	N/A
St Thomas More Catholic Primary School	Kidlington	N/A
Stadhampton Primary School	Watlington	N/A
Standlake (Church of England) Primary School	Eynsham	N/A
Stanford-In-The-Vale Church of England Primary School	Wantage	N/A
Stanton Harcourt Church of England Primary School	Eynsham	N/A
Stephen Freeman Community School	Didcot	N/A

Stockham Primary School	Wantage	N/A
Stoke Row Church of England Primary School	Woodcote	N/A
Stonesfield Primary School	Woodstock	N/A
Sunningwell Church of England Primary School	Abingdon	PA4 - West
Sutton Courtenay Church of England Primary School	Abingdon	PA3 - South
Tackley Church of England Primary School	Woodstock	N/A
Tetsworth Primary School	Thame	N/A
Thameside Primary School	Abingdon	PA3 - South
The Batt Church of England Aided Primary School, Witney	Witney	PA2 - South
The Blake Church of England (Aided) Primary School	Witney	PA1 - North
The Grange Community Primary School	Banbury	N/A
The Hendreds Church of England Primary School	Wantage	N/A
The Ridgeway CE Primary School, Childrey	Wantage	N/A
Thomas Reade Primary School	Abingdon	PA1 - North
Tower Hill School	Witney	PA2 - South
Trinity Church of England Primary School	Henley	N/A
Tyndale Community School	Oxford (Isis)	PA3 - Central
Uffington Church of England Primary School	Wantage	N/A
Valley Road School	Henley	N/A
Wantage Church of England Primary School	Wantage	N/A
Watchfield Primary School	Faringdon	N/A
Watlington Primary School	Watlington	N/A
West Kidlington Primary School	Kidlington	N/A
West Oxford Community Primary School	Cumnor	N/A
West Witney Primary School	Witney	PA2 - South
Wheatley Church of England (C) Primary School	Wheatley	N/A
Whitchurch Primary School	Woodcote	N/A
William Fletcher Primary School	Woodstock	N/A
William Morris School	Banbury	N/A
Willowcroft Community School	Didcot	N/A
Windale Primary School	Oxford (South East)	PA4 - South
Windmill Primary School	Oxford (Headington)	PA2 - East

Witney Community Primary School	Witney	PA1 - North
Wolvercote Primary School	Oxford (Cherwell)	PA1 - North
Wood Farm Primary School	Oxford (Headington)	PA2 - East
Woodcote Primary School	Woodcote	N/A
Woodstock Church of England Primary School	Woodstock	N/A
Wootton St Peter Church of England School	Abingdon	PA4 - West
Wootton-by-Woodstock CE (Aided) Primary School	Woodstock	N/A
Wroxton Church of England Primary School	Bloxham	N/A
Wychwood Church of England Primary School	Burford	PA1 - North

Alphabetical list of secondary schools

Aureus School	Didcot
Bartholomew School	Eynsham
Bicester Technology Studio	Bicester
Blessed George Napier Catholic School	Banbury
Burford Secondary School	Burford
Carterton Community College	Carterton
Cheney School	Oxford (Headington)
Chiltern Edge School	Sonning Common
Chipping Norton School	Chipping Norton
Didcot Girls' School	Didcot
Europa School UK	Abingdon
Faringdon Community College	Faringdon
Fitzharrys School	Abingdon
Futures Institute Banbury (formerly Space Studio Banbury)	Banbury
Gillotts School	Henley
Gosford Hill School	Kidlington
Heyford Park Free School	Bicester
Icknield Community College	Watlington
John Mason School	Abingdon
King Alfred's Academy	Wantage
Langtree School	Woodcote
Larkmead School	Abingdon
Lord Williams's School	Thame
Matthew Arnold School	Cumnor
North Oxfordshire Academy	Banbury
Oxford Academy	Oxford (South East)
Oxford Spires Academy	Oxford (Isis)
St Birinus School	Didcot
St Gregory the Great Catholic School	Oxford (Isis)
The Bicester School	Bicester
The Cherwell School	Oxford (Cherwell)
The Cooper School	Bicester
The Henry Box School	Witney
The Marlborough Church of England School	Woodstock
The Swan School	Oxford (Cherwell)
The Warriner School	Bloxham
University Technical College (UTC) Oxfordshire	Didcot
Wallingford School	Wallingford
Wheatley Park School	Wheatley
Wood Green School	Witney
Wykham Park Academy (formerly Banbury Academy)	Banbury

Abingdon

NEW PLANNING SUB-AREAS: PA1 - Abingdon North; PA2 - Abingdon East; PA3 - Abingdon South; PA4 - Abingdon West

Primary schools	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Abbey Woods Academy	Berinsfield [PA2]	2007	ACA	16	45	23	300	181	45	20	21	An academy sponsored by Anthem (formerly known as CfBT). Large-scale regeneration of Berinsfield is being consulted on by SODC, including a new school. Substantive nursery places of 78 pte. Berinsfield Pre-school located on an adjacent site.
Caldecott Primary School	Abingdon [PA3]	2605	COM	110	60	60	420	355	60	60	59	Expanded to 2 form entry (previous admission number 45) from 2014, pupil numbers still rising. Funded early years provision for 2 year olds in adjoining former Childrens Centre.
Carswell Community Primary School	Abingdon [PA3]	2595	COM	40	30	30	270	223	30	31	30	Accepted additional intakes in 2013 and 2014 in response to local population pressures. Capacity is expected to return to 210 once these bulge classes have left in 2021.
Clifton Hampden CE Primary School	Clifton Hampden [PA2]	3183	VC	0	10	12	70	76	10	16	13	Clifton Hampden and Culham Parochial primary schools have been federated since 2016. Pupil numbers have fallen at Culham Parochial Primary School. A consultation has been carried out into merging these two schools, moving all pupils to the Clifton Hampden site. If approved, the merged school would have a capacity of 105 places, and an annual intake of 15. Culham Parochial's nursery is not currently admitting pupils.
Culham Parochial CE School	Culham [PA2]	3190	VC	0	10	1	67	33	10	2	3	
Dorchester St Birinus CE School	Dorchester [PA2]	3186	VC	0	15	6	105	84	15	5	7	Shares site & building with Dorchester-on-Thames Pre-school. Annual intakes fluctuate significantly.

Abingdon

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Drayton Community Primary School	Drayton [PA3]	2560	COM	0	30	30	210	185	30	29	29	Expanded from an admission number of 20 to 30 (i.e. 1 form entry, 210 places) with a building project to provide capacity for local housing growth (the Neighbourhood Plan includes c250 new homes). Pupil numbers still rising. Using governors' powers to provide early years provision for 3 & 4 year olds from Sept 2018.
Dry Sandford Primary School	Dry Sandford [PA4]	2565	COM	0	20	15	140	99	20	22	20	Accepted over its admission number in 2015 and 2016 in response to local population pressures. Potential to expand if required.
Dunmore Primary School	Abingdon [PA1]	3861	COM	52	60	59	420	407	60	57	57	Capacity returned to 420 for 2018/19 onwards, following the departure of a previous "bulge" class. Extended age range down to 2 year olds from Sept 18 but commissioning this out from 19/20.
Europa School UK	Culham [PA2]	4002	ACA	0	84	84	588	504	90	122	90	Opened as a Free School 2012. Serves a wider catchment area. Increased Reception intake from 56 to 84 in 2015, and to 90 in 2019. Capacity shown for primary phase only, and based on admission number of 84; with the new admission number of 90, total primary capacity will increase to 630. Older year groups show apparent spare capacity as they predate the increase in admission number.
Long Furlong Primary School	Abingdon [PA1]	2602	COM	26	30	28	210	202	30	30	30	Nursery class currently only operating in the mornings; to be reviewed for 20/21.

Abingdon

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Marcham CE Primary School	Marcham [PA4]	3235	VC	0	30	30	210	157	30	27	28	Expanded from an admission number of 20 to 30 (i.e. 1 form entry, 210 places) to provide capacity for local housing growth, using temporary accommodation ahead of the completion of a permanent extension. Pupil numbers still rising. Shares site and building with Marcham Pre-school.
Radley CE Primary School	Radley [PA1]	3238	VC	30	15	17	105	105	15	16	15	Local Plan allocation for significant housing growth. Additional land secured through a section 106 agreement to enable the school to expand to 1 form entry. Nursery has physical capacity for 48 pte.
Rush Common School	Abingdon [PA1]	2574	ACA	0	60	59	420	401	60	57	60	Part of the Abingdon Learning Trust.
St Blaise CE Primary School	Milton Heights [PA3]	3260	VC	0	15	16	105	91	15	12	14	School expanded from an admission number of 10 in 2017 to meet the needs of smaller permitted housing developments; further expansion to 1 form entry from 2020 is underway to meet the scale of housing growth allocated in the Local Plan, for which additional site area for the school will be provided. Red Dragon Pre-school operates within school buildings.
St Edmund's (VA) Catholic Primary School	Abingdon [PA1]	3856	VA	52	30	28	240	204	30	26	27	Capacity returns to 210 from September 2019 onwards, as a "bulge" class admitted in 2012 has now left.

Abingdon

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
St Michael's CE Primary School	Steventon [PA3]	3241	VC	52	30	16	210	168	30	28	28	School has been expanded from an admission number of 20 to one of 30 (i.e. 1 form entry, 210 places). This expansion will provide capacity for planned/permitted local housing growth, but pupil numbers are still rising and any significant further housing growth is expected to exceed the school's expanded capacity, and it is not thought that the school could expand further. School has extended its age range through merging with the pre-school.
St Nicolas CE Primary School	Abingdon [PA1]	3247	VC	0	60	60	420	413	60	61	59	As well as an admission number of 60 for Reception), the school admits an additional 4 children into Year 3. Shares site with St Nicolas Pre-school and Playgroup.
Sunningwell CE Primary School	Sunningwell [PA4]	3242	VC	0	15	16	105	94	15	14	14	Shares site and building with Sunningwell Pre-school.
Sutton Courtenay CE Primary School	Sutton Courtenay [PA3]	3243	ACA	52	30	25	210	151	30	24	24	Expanded from an admission number of 20 to 30 to provide capacity for local housing growth. Pupil numbers still rising. Further expansion may become necessary, especially if housing growth exceeds that currently proposed in the Local Plan. Converted to academy in April 2019 as part of the Ridgeway Education Trust.
Thameside Primary School	Abingdon [PA3]	2598	ACA	52	30	30	210	179	30	23	23	School has helped meet the local pressure on school places through flexibility in its annual intake. There has been a feasibility study into permanent expansion, which would be implemented if local population growth due to local housing development causes a shortage of school places. Shares site with Ladybirds @Riverside Pre-school. Part of Vale Academy Trust.

Abingdon

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Thomas Reade Primary School	Abingdon [PA1]	2587	COM	15	30	30	210	204	30	29	29	Has been over-subscribed from within catchment in some years.
Wootton St Peter CE (VA) Primary School	Wootton [PA4]	3854	VA	0	16	10	112	89	16	9	10	Constrained site would make it difficult to expand this school.
Total for partnership				497	755	685	5357	4605	761	720	690	
% spare places						9%		14%		5%	9%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Europa School UK	Culham	4002	ACA	4-19	56	55	532	359	56	59	59	Opened as a Free School 2012. Serves a wider catchment area. As an all-through school, pupils transfer directly from Yr 6 and therefore do not need to apply for a place. Applications data for 2019 assumes all pupils will transfer. Admission number shown represents the number of places currently provided in Yr 7; will increase to 84, and eventually 90, as the higher primary admission numbers feed through. Capacity shown for secondary phase only, and based on admission number of 84; with the new admission number of 90, total secondary capacity will increase to c630. Older year groups show apparent spare capacity as they predate the increase in admission number. Allocation number is as reported by the academy.

Abingdon

Secondary schools (cont)	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Fitzharrys School	Abingdon	4127	ACA	11-18	180	118	1051	548	180	118	151	Includes co-located resource unit for speech, language & communication and autistic spectrum disorder special needs. Converted to academy in November 2018 as part of the Abingdon Learning Trust. Dunmore Pre-school is located on the edge of Fitzharry's site playing field, behind the site of Dunmore Primary School.
John Mason School	Abingdon	4126	ACA	11-18	180	161	1040	954	180	172	180	Part of the Abingdon Learning Trust.
Larkmead School	Abingdon	4125	ACA	11-18	180	150	1060	761	180	135	161	Includes co-located resource unit for hearing impairment special needs.
Total for partnership					596	484	3683	2622	596	484	551	
% spare places						19%		29%		19%	8%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts (More detailed forecasts are included at the end of this Plan.)
Reception	696	679	717	678	708	<p>Forecasts do not include the housing proposals for this area in the emerging VOWH and SODC Local Plans, only those which are in adopted Local Plans or relate to permitted developments. Abingdon has an MoD base, and therefore numbers are subject to volatility related to personnel redeployments.</p> <p>Following several years of rapid growth in primary school pupil numbers, demand for Reception places dipped in 2017, but has started to grow again from 2018/19, with significant progress having been made towards housing planning. Housing growth, and the subsequent increase in demand for school places, is not consistent across the area. There is forecast to be a shortage of school places to the north and west of the town from 2021 onwards, which is disguised by a surplus to the east of the area. (Primary pupil forecasts for sub-areas of Abingdon are available in the annex to this Plan.)</p> <p>Demographic growth is now moving from the primary sector to the secondary sector, and the total number of secondary school pupils is now expected to grow throughout, and beyond, the current Plan period. Most of the impact of planned housing growth on secondary schools in particular will be beyond the period covered by this Plan.</p>
All primary	4713	4881	5060	5074	5110	
Year 7	548	497	533	606	622	
All secondary	2771	2890	3008	3185	3352	

Abingdon

Comments on school capacity

Recent expansions at Drayton, Sutton Courtenay, Marcham, St Michael's and St Blaise (to PAN 15) have kept combined Reception admission numbers ahead of population growth. Although forecasts overall show spare capacity, this is not evenly spread, with significant surplus capacity to the east of Abingdon, but forecast shortages to the north and west. A new primary school will be needed by the early 2020s for the N and NW Abingdon strategic housing developments, and further expansions in village schools (e.g. St Blaise, Radley) will be triggered by progress with local housing developments. The proposed merger of Culham Parochial and Clifton Hampden primary schools would, if approved, reduce surplus capacity to the east of Abingdon.

Across the secondary schools there is currently some surplus capacity but this will fall as the higher numbers now in primary school feed through to the secondary sector. Shortages of Year 7 places are forecast to emerge after 2022, based on current school sizes and pupil movement. Investigation of options for longer term expansion of secondary school capacity in this area is on hold awaiting a clearer picture of likely housing growth patterns, but at least one new school in the area around Abingdon is expected to become necessary. The Europa School (an all-through free school) completed its takeover of the former European School in September 2017 and now teaches the whole primary and secondary age range. Although shown in this planning area, it draws pupils from a wider area due to the bilingual education it provides.

Early Years Free Entitlement

Early years provision in this area currently just meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Abingdon Central	0	10	11	11	0	0	0	0	0	32	Stert Street [32].
Abingdon North	0	0	75	150	175	179	129	128	150	986	N Abingdon strategic site [879; 786 in plan period]; NW Abingdon [200].
Abingdon North Central	0	0	0	0	0	0	0	0	0	0	
Abingdon South	58	45	0	0	0	0	0	0	0	103	East of Drayton Rd, Abingdon [158, 103 in plan period].
Berinsfield	0	10	0	27	9	7	8	0	0	61	Lower Road, Garsington [10]; Marsh Baldon NDP Identified Sites [15]; Land off Fieldside Track, Long Wittenham [36].
Drayton, Steventon, Sutton Courtenay, Milton	156	152	182	171	128	60	110	110	110	1179	Drayton: Halls Close [28]; Manor Farm [57]; S of High Street [140]. Steventon: Hanney Road [44]; Abingdon Road [57; 15 in plan period]; Barnett Road [65]; Sutton Courtenay: South of Appleford Road [2 phases; 95+100; 192 in the plan period]; E of Sutton Courtenay [200; 150 in plan period]; Milton: Milton Hill [53]; Milton Heights [458; 435 in plan period].

Abingdon

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Sunningwell, Marcham, Radley, Wootton & north of Abingdon	121	47	26	62	85	55	55	55	0	506	Radley: NW of Radley [240]. Wootton: Besselsleigh Rd [64]; Marcham: Anson Field [13]; Land off Packhorse Lane [37]; Land of Sheepstead Road [2 sites = 37+47]; Packhorse Lane [54; 7 in plan period]; W of Hyde Copse [61].
Total	2352	2282	2313	2441	2418	2323	2325	2317	2285	2867	

This partnership is affected by the planning policies of both the Vale of White Horse (VOWH) and South Oxfordshire (SODC) District Councils.

The Vale of White Horse (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for 'at least' 20,560 homes, including: Abingdon (1150); Kennington (270); Radley (240); Sutton Courtenay (220); Kingston Bagpuize (280); Didcot Valley Park (2,550); NW of Valley Park (800); Milton Heights (400); Harwell (200); Crab Hill Wantage (1500); Monks Farm Grove (885); Stanford in the Vale (200); Faringdon & Coxwell (950); and Shrevenham (500). In addition, 2,500 homes at Grove Airfield were carried forward from the 2011 Local Plan.

On 9 October 2019, the council voted to adopt their Local Plan Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to include 2,200 as its contribution towards addressing Oxford's Unmet Need. Of these, by March 2018 6,300 had been completed and 13,387 more were already permitted. In addition to the Local Plan Part 1 allocations, the Part 2 Plan adds allocations of 130 homes in East Hanney (2 sites); a further 600 in Kingston Bagpuize with Southmoor, 90 to the south-east of Marcham, 1,200 at Dalton Barracks to the west of Abingdon, and a further 400 homes north-west of Grove (with the potential for further growth post-2031).

The current pupil forecasts include only the housing numbers in the previously adopted Local Plan Part 1 and not the increases now included in the Local Plan Part 2, unless they are already permitted sites.

Abingdon

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 12 larger villages, including Berinsfield.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034:

Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Banbury

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bishop Loveday CE (VA) Primary School	Bodicote	3351	ACA	0	60	41	420	374	60	44	46	Converted to academy in June 2017 as part of The Warriner MAT. Intakes are rising again after a dip in 2017.
Cropredy CE Primary School	Cropredy	3000	VC	0	30	21	210	166	30	26	26	School previously had a lower admission number (25). Total pupil numbers have been broadly stable in recent years. Shares site with Cropredy Pre-school.
Dashwood Banbury Academy	Banbury	2003	ACA	84	60	57	420	350	60	70	59	School has doubled its intake, and total pupil numbers are still growing. Part of Aspirations Academies Trust. Extended age range to 2 year olds from Jan 18, housed in new capital build.
Hanwell Fields Primary School	Banbury	3837	ACA	52	60	58	420	383	60	65	60	A United Learning Trust academy. Expanded to 2 form entry to meet the needs of local permitted housing development; pupil numbers are still rising. Extended age range to include 2 year olds.
Hardwick Community School	Banbury	2060	ACA	24	30	30	210	202	30	33	30	Converted to academy in February 2019 as part of GLF Schools. Extended age range to 2-11 from January 2018.
Harriers Banbury Academy	Banbury	2053	ACA	32	60	44	420	396	60	60	60	Part of Aspirations Academies Trust. School has been expanded to meet the needs of local population growth. School agreed to create a "bulge" class from January 2014 to provide for in-year Key Stage 1 arrivals.
Hill View Primary School	Banbury	2056	ACA	40	90	63	630	495	90	53	58	School is 3 form entry following capital project. Part of the United Learning Trust.

Banbury

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Longford Park Primary School	Banbury	2017	ACA	39	45	32	315	57	45	31	32	New school opened September 2017 to serve a new housing development, with an admission number of 30 in the first year, rising to 45; school is expected to expand to 2 form entry in due course. School early years provision for 2 year olds and up. Part of GLF Schools multi-academy trust.
Orchard Fields Community School	Banbury	2055	COM	60	60	53	420	333	60	27	27	Offering places for funded 2 year olds, under governors powers
Queensway School	Banbury	2057	COM	0	60	50	420	394	60	52	55	Expanded to 2 form entry; pupil numbers have risen rapidly but now stabilising. Offering nursery provision under governors powers from Sept 19.
St John's (VA) Catholic Primary School	Banbury	3350	VA	0	38	34	315	250	38	15	17	School has often admitted in excess of its published admission number but has seen a sudden fall in demand for places in 2019.
St Joseph's (VA) Catholic Primary School	Banbury	3825	ACA	60	30	24	210	190	30	18	18	Part of Pope Francis Catholic Multi Academy Company, with Holy Trinity Catholic Primary in Chipping Norton and Blessed George Napier (secondary) School in Banbury.
St Leonard's CE Primary School	Banbury	3262	VC	120	60	43	420	337	60	50	60	Pupil numbers have declined in recent years, as Dashwood's expansion has increased capacity in this area of Banbury.
St Mary's CE Primary School	Banbury	3022	VC	52	30	27	210	172	30	26	30	Temporary classroom accommodates integrated wraparound care as well as other uses, including 3rd parties.

Banbury

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
The Grange Primary School	Banbury	2058	COM	0	45	48	315	325	45	58	45	Chasewell Playgroup operates from Chasewell Community Centre, which is on the school site. Pupil numbers have risen rapidly in recent years.
William Morris School	Banbury	2019	ACA	26	25	12	175	106	25	20	20	Part of GLF Schools MAT. Academy Trust is planning a major capital project, funded by developer contributions, to increase admission number to 30 and reduce the school's significant reliance on temporary accommodation.
Total for partnership				589	783	637	5530	4530	783	648	643	
% spare places						19%		18%		17%	18%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Blessed George Napier Catholic School	Banbury	4600	ACA	11-18	142	145	847	861	150	205	150	Admitted 150 pupils into Year 7 for September 2019. Academy trust are exploring the possibility of a 2FE expansion. Catholic school; draws from a wide area. On a constrained site; the county council is seeking to secure additional playing field space for the school to allow it to expand in response to local housing developments. Part of Pope Francis Catholic Multi Academy Company.
North Oxfordshire Academy	Banbury	6905	ACA	11-19	180	179	1150	960	180	190	180	Part of United Learning Trust. Academy operates on-site NOA's Ark Day Nursery.

Banbury

Secondary schools (cont)	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Futures Institute Banbury - formerly called Space Studio Banbury	Banbury	4006	ACA	14-18	75 in Year 10	12 in Year 10	300	73	75 in Year 10	46 in Year 10	46 in Year 10	Part of Aspirations Academies Trust and co-located with Banbury Academy. Opened September 2014. Allocation number and change of name is as reported by the academy.
Wykham Park Academy - formerly called Banbury Academy	Banbury	4000	ACA	11-18	210	190	1300	844	210	112	183	Part of Aspirations Academies Trust and co-located with Space Studio Banbury. Capacity revised in 2015 as the Space Studio now occupies one building. Academy increased its admission number from 180 from Sept 2016. Shares site with Banbury School Day Nursery (independent of the school).
Total for partnership					532	514	3597	2738	540	507	513	
% spare places						3%		24%		6%	5%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts (More detailed forecasts are included at the end of this Plan.)
Reception	663	710	682	749	782	Demand for school places will continue to grow beyond the time period covered by these forecasts, as a result of large scale strategic housing growth. For several years pupil intakes at primary schools in this area rose significantly faster than previously forecast, and some schools were required to create "bulge" classes at short notice. Population growth stabilised in recent years, but demand for primary school places is forecast to start growing again due to very significant housing development which is planned for the area. Although there are forecast to be sufficient primary school places overall until 2023, pressure will be felt sooner than this in localised areas affected by housing growth. For secondary education there is significant pupil movement between Banbury and Bloxham, and the initial phase of population growth in Banbury is being supported by the expansion of the Warriner School in Bloxham. Despite this, pressure will remain on secondary school places until expansion is possible within Banbury.
All primary	4609	4706	4750	4806	4900	
Year 7	513	500	526	554	526	
All secondary	2797	2927	3009	3136	3180	

Banbury

Comments on school capacity

Recent expansions at several Banbury schools, along with the new Longford Park School, have kept combined Reception admission numbers ahead of population growth. There has been a recent lull in growth, resulting in a temporary surplus of places, but as housing progresses, demand for places is expected to rise again and more capacity will be required. Another new school is due to open at Southam Road, Banbury in 2020, and beyond that a new school will be needed on the development south of Salt Way. Longford Park School is also expected to expand to 2 form entry in due course as the local housing development progresses.

The previous surplus places at the town's secondary schools are being quickly eroded as the rising pupil numbers now in the primary sector reach secondary age. Secondary school places are being planned across the Banbury/Bloxham area, to recognise the significant levels of pupil movement between the areas. Expansion is being implemented in stages, and started in 2016 with an additional form of entry into Banbury Academy; in 2017 The Warriner School in Bloxham added a form of entry, and another form of entry in 2019 supported by a major capital project. There is currently forecast to be a shortage of Year 7 places in 2021, and increasing pressure on places in the longer term. Two options are being pursued: the expansion of Blessed George Napier RC School, and (longer term) a new school to serve Banbury.

As Blessed George Napier School is on a constrained site, the county council is seeking additional land through a section 106 agreement, related to Local Plan housing allocations, to allow the school to expand by 2 forms of entry. As this expansion is dependent on land availability, it may be that a "bulge" class at a Banbury school is required in 2021 to meet the forecast demand. As much of the housing development proposed in the Cherwell Local Plan will only fully affect secondary pupil numbers beyond the period shown in this Pupil Plan, in the longer term it is expected that a new secondary school will also be needed in Banbury. Current population projections suggest this will be needed in the mid-late 2020s, and would be expected to be 4-6 forms of entry. A secondary Free School providing greater diversity of provision within Banbury would be one possible solution to increasing secondary school capacity, and potential sponsors will be sought in due course. A potential site has been identified through the Cherwell Local Plan.

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required in response to population growth from planned housing developments. The new schools planned in the area will include nursery classes.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Banbury Calthorpe	142	75	150	100	113	100	100	100	100	980	Bankside Phase 1 (Longford Park) [1090; 530 in plan period]; Bankside Phase 2 [600, 450 in plan period].
Banbury Cross	0	0	0	0	0	0	0	0	0	0	
Banbury Easington	145	160	119	204	186	200	200	193	150	1557	Broughton Road [78]; NE of Crouch Hill Farm [40]; S of Salt Way (E) [1425; 926 in plan period]; S of Salt Way (W) [318]; Mercia House [10]; West Bar Street [2 sites = 12+17]; Warwick Road [7]; Cotefield Farm, Bodicote [86; 54 in plan period]; Cotefield Farm Phase 2, Bodicote [95].

Banbury

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Banbury Grimsbury	100	100	178	347	236	130	100	100	100	1391	Canalside [586; 400 in plan period]; Canalside Station Road [114]; Bolton Road [200]; Higham Way [150]; W of Southam Road [90]; E of Southam Road [510; 405 in plan period]; Christchurch Court [37]; Broad Street [12]; Malthouse Walk [20].
Banbury Hardwick	106	120	130	205	230	180	66	0	0	1037	N of Hanwell Fields [544; 487 in plan period], W of Warwick Road [300], Drayton Lodge Farm [250].
Banbury Ruscote	104	50	60	60	60	50	50	50	23	507	The Fairway [11]; West of Bretch Hill [510; 496 in plan period].
Adderbury, Bloxham, Bodicote	55	64	26	0	0	0	0	0	0	145	Banbury Road, Adderbury [25]; N of Milton Road, Adderbury [36; 35 in plan period]; S of Milton Road, Bloxham [85].
North Cherwell	6	20	17	0	0	0	0	0	0	43	Main Street, Great Bourton [43].
Total	2675	2607	2699	2936	2846	2682	2539	2467	2398	5660	

The Cherwell Local Plan 2011-2031 was adopted in July 2015. The Plan focuses housing growth on Bicester (9,764 new homes between 2014 and 2031) and Banbury (7,106 new homes), with a further 4,864 new homes across the rest of the district. These totals include, for Banbury, 700 homes at Canalside; 600 on Southam Road; 400 West of Bretch Hill; further growth at Bankside; 544 north of Hanwell Fields; 200 at Bolton Road; 1495 south of Salt Way; 250 at Drayton Lodge Farm and 150 on Higham Way. For rural areas, in addition to strategic growth of 2,361 new homes at Upper Heyford, the Plan expects a further 750 homes to be delivered through developments of 10 or more homes across the most sustainable villages: Adderbury, Ambrosden, Arccott, Begbroke, Bletchingdon, Bloxham, Bodicote, Chesterton, Cropredy, Deddington, Finmere, Fringford, Fritwell, Hook Norton, Kidlington, Kirtlington, Launton, Milcombe, Sibford Ferris/Gower, Steeple Aston, Weston on the Green, Wroxton and Yarnton. Sites will be identified through the preparation of the Local Plan Part 2, through the preparation of Neighbourhood Plans where applicable, and through the determination of applications for planning permission.

Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need. The proposed distribution is for 1,180 homes across 2 sites in North Oxford; 330 homes across 2 sites south of Kidlington; 2,390 across Begbroke and Yarnton and 500 south east of Woodstock. The Planning Inspector issued a preliminary advice note in July 2019, proposing modifications to the Plan. CDC will be carrying out further work to respond to this, and hope to submit a modified Plan by the end of 2019. This is not expected to affect schools in this planning area. The current pupil forecasts include only the housing numbers in the adopted Local Plan, and permitted sites.

Bicester

NEW PLANNING SUB-AREAS: PA1 - Bicester North Town; PA2 - Bicester South East; PA3 - Bicester South West; PA4 - Bicester North Villages

Primary schools	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Brookside Primary School	Bicester [PA3]	2202	COM	52	45	41	315	305	45	47	45	Pupil numbers have grown in recent years. Jack & Jill Pre-school operate from the former children's centre building on the school site.
Bure Park Primary School	Bicester [PA1]	2610	COM	60	70	44	480	413	70	65	70	Reduction of admission number to 60 would remove the need for the current temporary accommodation.
Charlton-on-Otmoor CE Primary School	Charlton-on-Otmoor [PA2]	3081	VC	20	15	17	105	83	15	7	8	
Chesterton CE (VA) Primary School	Chesterton [PA3]	3082	VA	0	20	16	140	130	25	24	24	Expanding to 1 form entry from 2020.
Finmere CE Primary School	Finmere [PA4]	3090	VC	0	7	11	52	49	11	10	11	Pupil numbers have risen rapidly in the last two years.
Five Acres Primary School	Ambrosden [PA2]	2200	COM	52	60	53	420	339	60	55	55	Numbers affected by MoD redeployments. Planned replacement of temporary accommodation with permanent.
Fringford CE Primary School	Fringford [PA4]	3083	VC	0	15	14	105	93	15	11	10	Shares site with Shelswell & Fringford Playgroup.
Fritwell CE Primary School	Fritwell [PA4]	3065	VC	15	30	12	180	124	30	17	17	Since Heyford Park Free School opened, that is now the closest school for some villages which previously fed to Fritwell, which has reduced demand for places at this school. Mixed Nursery/Reception opened Sept 16.
Gagle Brook Primary School	Bicester [PA1]	2014	ACA	52	30	19	210	19	30	24	24	New school opened September 2018 to serve a new housing development. Part of the White Horse Federation Trust.
Glory Farm Primary School	Bicester [PA1]	2211	ACA	52	60	42	459	389	60	30	30	Part of Bicester Learning Academy MAT. Shares site with Bardwell (special) School. Bulge class of 75 admitted in 2013 is still working through the school - capacity will return to 420 in 2020. Shares site with Rainbow Playgroup.

Bicester

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Heyford Park Free School	Upper Heyford [PA4]	4003	ACA	52	60	42	420	304	60	43	43	Opened Sept 2013 as an all-through school. Numbers will continue to grow as housing is developed. Nursery opened for the 2017/18 school year.
King's Meadow Primary School	Bicester [PA3]	2210	COM	30	60	47	432	382	60	57	60	
Langford Village Community Primary School	Bicester [PA2]	2608	COM	52	60	60	420	397	60	53	52	Primary school numbers have been successfully managed down from previous unsustainable level. Shares site with Cygnets Pre-school. Temporary reduction in nursery PAN agreed, down from substantive 78pte.
Launton CE Primary School	Launton [PA2]	3085	VC	10	20	14	157	140	20	15	15	Potential for permanent expansion to PAN 30 explored but expansion not currently viable due to high cost of identified accommodation solution. School admits above PAN in some years as its accommodation allows. Shares site with Launton Playgroup.
Longfields Primary School	Bicester [PA2]	2207	COM	52	60	53	420	338	60	46	48	Expanded from PAN 40 to 60 (completed 2017) to provide more town centre capacity following relocation of St Edburg's.
Southwold Primary School	Bicester [PA1]	2607	ACA	52	60	35	420	277	60	32	30	Part of the White Horse Federation MAT.
St Edburg's CE (VA) School	Bicester [PA3]	3505	VA	52	60	60	420	310	60	77	60	Expanded to 2 form entry and relocated to Kingsmere housing development in SW Bicester in January 2016.
St Mary's (VA) Catholic Primary School	Bicester [PA3]	3824	VA	0	45	24	315	237	45	22	28	
Total for partnership				603	777	604	5470	4329	786	635	630	
% spare places						22%		21%		19%	20%	

Bicester

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bicester Technology Studio	Bicester	4012	ACA	14-19	60 in Year 10	34 in Year 10	310	101	60 in Year 10	46 in Year 10	46 in Year 10	14-19 age range Studio School, opened September 2016. Part of Activate Learning MAT. Allocation number is as reported by the academy.
Heyford Park Free School	Upper Heyford	4003	ACA	3-19	60	58	420	314	60	62	62	Opened Sept 2013. All-through school (primary and secondary) - 2019/20 sees the school's first Year 13 cohort, bringing all year groups into operation. As of 2019/20 Year 6 pupils are transferring directly into Year 7, but any spare Year 7 places can be applied for by external applicants. Allocation number is as reported by the academy.
The Bicester School	Bicester	4011	ACA	11-18	240	237	1430	1003	240	240	270	Part of Activate Learning MAT. School agreed to take a "bulge" class in 2019 to meet a shortage of places following the delay to opening a new school in Bicester.
The Cooper School	Bicester	4032	ACA	11-18	220	223	1333	1284	220	218	220	Part of Bicester Learning Academy MAT with Glory Farm Primary School. Shares a site with Bardwell (special) School.
Total for partnership					520	518	3493	2702	520	520	552	
% spare places						0%		23%		0%	-6%	

Bicester

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts (More detailed forecasts are included at the end of this Plan.)
Reception	626	680	673	646	685	Demand for school places will continue to grow beyond the time period covered by these forecasts, as a result of large scale strategic housing growth. Housing growth, and the subsequent increase in demand for school places, is not consistent across the area. There is forecast to be a shortage of school places to the south of the town from 2020 onwards, which is disguised by a surplus to the north of the town, and in some surrounding villages. (Primary pupil forecasts for sub-areas of Bicester are available in the annex to this Plan.) The higher numbers already evident in the primary schools are now starting to transfer to secondary schools, resulting in a sharp increase in demand for places; existing secondary school capacity is insufficient from 2019 onwards.
All primary	4401	4511	4599	4626	4675	
Year 7	550	572	583	623	610	
All secondary	2863	3036	3197	3373	3485	

Comments on school capacity

Recent expansions at several Bicester schools, along with the new Gagle Brook Primary School, sponsored by the White Horse Federation, which opened in 2018, have kept combined Reception admission numbers ahead of population growth. Further capacity will be required in the longer term due to the scale of housing growth planned, and new primary schools within large housing developments such as SW Bicester, SE Bicester and Graven Hill may be required to open sooner than overall forecasts indicate to ensure easy access to school places for families. The new Graven Hill school is currently planned to be the next new school, expected to open in 2021; The Warriner Multi Academy Trust has been approved to sponsor this school. Primary school catchment areas were revised for 2017 onwards, to reflect the relocation of St Edburg's Primary School.

The previous surplus places at the town's secondary schools are being quickly eroded as the rising pupil numbers now in the primary sector reach secondary age, resulting in a shortage of Year 7 places in 2019. Planned and permitted housing growth will further increase the need for school places. Additional secondary school places will be provided during this Plan period by the opening of a new school, the Whitelands Academy, providing 120 places per year group, sponsored by the White Horse Federation, in SW Bicester. It was hoped that this would open in 2019, but due to a delay in the site being transferred this is no longer possible, and the shortage of places for 2019 was met through an existing school taking a "bulge" class. In the longer term, another new secondary school is expected within the NW Bicester development.

The Heyford Park Free School is intended to serve the housing development at Upper Heyford. In the earlier years of that development it will provide more places than required by its local area, temporarily creating spare capacity in this partnership. Longer term it will need to expand in line with the local population.

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required in response to population growth from planned housing developments. The new schools planned in the area will include nursery classes.

Bicester

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Bicester East	0	25	73	28	0	0	0	0	0	126	Skimmingdish Lane [46]; Bessemer Close [70]; Churchill Road [10].
Bicester North	65	25	65	115	220	238	220	220	220	1388	Eco Town [393; 303 in plan period; NW Bicester Phase 2 [2185; 1085 in plan period].
Bicester South	81	100	270	385	485	590	615	564	375	3465	Gavray Drive [300]; Talisman Road [125; 52 in plan period]; SW Bicester Phase 2 [709]; SE Bicester [1500; 900 in plan period]; Graven Hill [2100; 1504 in plan period].
Bicester West	0	0	0	0	0	0	0	0	0	0	
East Cherwell (including Ambrosden, Launton)	22	2	50	48	30	27	0	0	0	179	Ambrosden: Merton Road [44; 22 in plan period]; Blackthorn Road [85]. Launton: Launton Road & Blackthorn Road [72]
Heyford & Deddington	158	107	130	130	130	150	150	150	150	1255	Gaveston Gardens, Deddington [85; 82 in plan period]; Upper Heyford [2186; 1173 in plan period].
South Cherwell (including Bletchington, Chesterton, Weston-on-the-Green)	203	253	280	150	73	0	0	0	0	959	SW Bicester Phase 1 [1742; 819 in plan period]; N of Station Road, Bletchington [61]; The Paddocks, Chesterton [45]; Station Road, Enslow [14]; N of Oak View, Weston-on-the-Green [20].
Total	529	512	868	856	938	1005	985	934	745	7372	

The Cherwell Local Plan 2011-2031 was adopted in July 2015. The Plan focuses housing growth on Bicester (9,764 new homes between 2014 and 2031) and Banbury (7,106 new homes), with a further 4,864 new homes across the rest of the district. These totals include, in Bicester, 3293 homes at the NW Bicester Eco-Town (growing to 6000 homes beyond the plan period); 2,100 homes at Graven Hill; further growth at SW Bicester; 1500 homes at SE Bicester; 300 homes at Gavray Drive.

For rural areas, in addition to strategic growth of 2,361 new homes at Upper Heyford, the Plan expects a further 750 homes to be delivered through developments of 10 or more homes across the most sustainable villages: Adderbury, Ambrosden, Arncott, Begbroke, Bletchington, Bloxham, Bodicote, Chesterton, Cropredy, Deddington, Finmere, Fringford, Fritwell, Hook Norton, Kidlington, Kirtlington, Launton, Milcombe, Sibford Ferris/Gower, Steeple Aston, Weston on the Green, Wroxton and Yarnton. Sites will be identified through the preparation of the Local Plan Part 2, through the preparation of Neighbourhood Plans where applicable, and through the determination of applications for planning permission.

Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need. The proposed distribution is for 1,180 homes across 2 sites in North Oxford; 330 homes across 2 sites south of Kidlington; 2,390 across Begbroke and Yarnton and 500 south east of Woodstock. The Planning Inspector issued a preliminary advice notice in July 2019, proposing modifications to the Plan, including deletion of the Woodstock allocation. CDC will be carrying out further work to respond to this, and hope to submit a modified Plan by the end of 2019. Although outside of this planning area, there may be some knock-on effect of a growing population in the Marlborough School and Gosford Hill School catchments, as these schools currently attract some pupils from the Bicester area. The current pupil forecasts include only the housing numbers in the adopted Local Plan, and permitted sites.

Bloxham

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bishop Carpenter CE (VA) Primary School	North Newington	3302	ACA	0	16	14	112	104	16	10	10	Part of The Warriner MAT.
Bloxham CE Primary School	Bloxham	3064	VC	0	60	60	420	425	60	60	60	Recent and permitted local housing development is expected to maintain pressure on school places. Shares site with Bloxham Pre-school.
Christopher Rawlins CE (VA) Primary School	Adderbury	3453	VA	52	45	31	315	211	45	49	45	Expanded to 1.5 form entry from September 2017 with a building project to meet need for additional places in the Adderbury/ Deddington area, and also to relieve pressure on Bloxham.
Deddington CE (VA) Primary School	Deddington	3452	ACA	0	30	28	210	201	30	27	28	Converted to Academy July 2017 as part of Oxford Diocesan Schools Trust (ODST). Shares site with Deddington Partnership Foundation Stage Unit (Pre-school).
Dr Radcliffe's CE (VA) Primary School	Steeple Aston	3828	ACA	0	30	21	210	192	30	32	30	Converted to academy in June 2017 as part of Oxford Diocesan Schools Trust (ODST).
Hornton Primary School	Hornton	2001	ACA	40	15	16	105	80	15	16	15	Part of The Warriner MAT. This school has no hall.
Shenington CE (VA) Primary School	Shenington	5200	VA	0	15	10	105	93	15	15	15	
Sibford Gower Endowed Primary School	Sibford Gower	3005	ACA	0	20	14	155	109	20	13	13	Part of The Warriner MAT.
Wroxton CE (VA) Primary School	Wroxton	3004	ACA	0	15	10	105	93	15	8	8	Converted to academy as part of Oxford Diocesan Schools Trust (ODST).
Total for partnership				92	246	204	1737	1508	246	230	224	
% spare places						17%		13%		7%	9%	

Bloxham

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
The Warriner School	Bloxham	4007	ACA	11-18	256	251	1450	1306	284	288	285	Part of The Warriner MAT with several primary schools in the area. Includes special resource unit for speech, language and communication and autistic spectrum disorder. Capacity is estimated as for 2019, pending completion of a capital project to expand the school, which is expected to increase capacity to approximately 1600 places. Pupil numbers are rising rapidly.
% spare places						2%	10%	-1%	0%			

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts (More detailed forecasts are included at the end of this Plan.)
Reception	226	232	209	212	219	Some villages without housing growth may see their pupil numbers fall, as the birth rate is currently thought to have peaked with the 2015 Reception cohort. Secondary, and to a lesser extent primary, pupil numbers are also affected by the balance between supply and demand of places within Banbury. Demand for places at the Warriner School may exceed the forecast pupil numbers shown due to the school's popularity, but this will be driven by population growth in Banbury, where additional school capacity will be needed.
All primary	1515	1560	1565	1569	1592	
Year 7	285	271	284	284	286	
All secondary	1387	1482	1556	1609	1636	

Comments on school capacity

A sustained period of growth due to demographic trends and smaller scale local developments required the expansion of Bloxham Primary School to 2 form entry and of Christopher Rawlins CE Primary School to 1.5 form entry. This, along with the additional capacity provided on the southern edge of Banbury by the opening of Longford Park Primary School in 2017, and the expansion of Hook Norton Primary School (see Chipping Norton section) to the south west of this area, has created sufficient primary school capacity for the current Plan period. However, even when there are sufficient places across the partnership as a whole, individual schools may be over-subscribed.

Expansion of The Warriner School is underway to meet the expected growth in demand for places: the school increased its intake by one form of entry in 2017, and by another in 2019. This forms part of the expansion of secondary school capacity which will be needed to meet population growth across Banbury and its surrounding area, as detailed in the Banbury section.

Bloxham

Early Years Free Entitlement

Early years provision across this area currently meets the needs of the local population overall. It is likely that further housing development in the village will require additional capacity to be made available.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Adderbury, Bloxham, Bodicote	55	64	26	0	0	0	0	0	0	145	Banbury Road, Adderbury [25]; N of Milton Road, Adderbury [36; 35 in plan period]; S of Milton Road, Bloxham [85].
Heyford	158	107	130	130	130	150	150	150	150	1255	Gaveston Gardens, Deddington [85; 82 in plan period]; Upper Heyford [2186; 1173 in plan period].
North Cherwell	6	20	17	0	0	0	0	0	0	43	Main Street, Great Bourton [43].
West Cherwell	53	26	55	20	0	0	0	0	0	154	SW of Tadmarton Road, Bloxham [60]; N of The Green, Milcombe [40]; S of Redland Farm, Hook Norton [54].
Total	272	217	228	150	130	150	150	150	150	1597	

The Cherwell Local Plan 2011-2031 was adopted in July 2015. The Plan focuses housing growth on Bicester (9,764 new homes between 2014 and 2031) and Banbury (7,106 new homes), with a further 4,864 new homes across the rest of the district. These totals include some Banbury sites which lie partly or wholly within the current catchment areas of schools in this planning area, and which will in due course include new schools. For rural areas, in addition to strategic growth of 2,361 new homes at Upper Heyford, the Plan expects a further 750 homes to be delivered through developments of 10 or more homes across the most sustainable villages: Adderbury, Ambrosden, Arncott, Begbroke, Bletchington, Bloxham, Bodicote, Chesterton, Cropredy, Deddington, Finmere, Fringford, Fritwell, Hook Norton, Kidlington, Kirtlington, Launton, Milcombe, Sibford Ferris/Gower, Steeple Aston, Weston on the Green, Wroxton and Yarnton. Sites will be identified through the preparation of the Local Plan Part 2, through the preparation of Neighbourhood Plans where applicable, and through the determination of applications for planning permission.

Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need. The proposed distribution is for 1,180 homes across 2 sites in North Oxford; 330 homes across 2 sites south of Kidlington; 2,390 across Begbroke and Yarnton and 500 south east of Woodstock. The Planning Inspector issued a preliminary advice note in July 2019, proposing modifications to the Plan. This is not expected to affect schools in this planning area. Forecasts include only the housing in the adopted Local Plan, and permitted sites.

Burford

NEW PLANNING SUB-AREAS: PA1 - Burford North; PA2 - Burford South

Primary schools	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bampton CE Primary School	Bampton [PA2]	3131	ACA	60	30	22	210	156	30	18	19	Part of Oxford Diocesan Schools Trust (ODST). Pupil numbers have risen rapidly and the school has expanded to 1 form entry, which is currently forecast to be sufficient for this Plan period. The Old Station nursery occupies the former Children's Centre on the school site.
Brize Norton Primary School	Brize Norton [PA2]	2250	ACA	0	17	17	119	121	17	19	17	Part of Oxford Diocesan Schools Trust (ODST). School has increased admission number to 17 for 2017 onwards, and capacity has increased from 105 to 119.
Burford Primary School	Burford [PA1]	2251	ACA	30	15	13	105	99	15	12	13	Part of Oxford Diocesan Schools Trust (ODST). Following recently permitted housing, the Trust is conducting feasibility assessment into expanding the school to an admission number of 20, and a total capacity of 140, but further expansion beyond that is not thought possible due to its constrained site.
Clanfield CE Primary School	Clanfield [PA2]	3100	VC	0	15	14	120	113	15	16	14	Building work carried out by the school in 2017 provides flexibility to take more than 15 in some years, to meet demand. Shares site with Clanfield pre-school.
Leaffield CE Primary School	Leaffield [PA1]	3124	ACA	0	15	15	105	101	15	16	15	Converted to academy as part of Oxford Diocesan Schools Trust (ODST).
St Christopher's CE Primary School	Langford [PA2]	3555	ACA	0	22	22	166	148	22	27	22	Part of Oxford Diocesan Schools Trust (ODST). Previously had a second intake into Year 3, which is no longer necessary due to St Peter's Infant School extending its age range.

Burford

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
St Kenelm's CE Primary School	Minster Lovell [PA1]	3125	VC	0	20	18	157	108	20	20	20	Capacity shown is greater than that suggested by the school's admission number as it has one over-sized classroom. Has potential to expand if required to meet local population growth. Shares site with Minster Lovell Playgroup.
St Peter's CE Primary School	Alvescot [PA2]	3550	ACA	0	14	14	98	71	14	18	14	Part of Oxford Diocesan Schools Trust (ODST). Changed from an Infant School to a Primary School in Sept 2017: age range now 4-11. Admission number has reduced from 25 to 14, providing a total of 98 places. Additional classroom constructed by Diocese for Sept 2017.
Wychwood CE Primary School	Shipton-under-Wychwood [PA1]	3257	VC	0	45	37	315	292	45	43	42	Admission Number rose from 40 to 45 permanently from September 2017. Not offering nursery places in 19/20 (usually 17 pte) due to low demand.
Total for partnership				90	193	172	1395	1209	193	189	176	
% spare places						11%		13%		2%	9%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Burford School	Burford	4040	ACA	11-18	240	247	1284	1376	235	280	238	School decided to admit up to 270 in September 2017 and up to 240 in September 2018. For 2019 the admission number is 235 day pupils and 10 boarding pupils. Total capacity needs to be reassessed.
% spare places						-3%		-7%		-19%	-1%	

Burford

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	178	173	172	166	172	Primary school numbers in this area are expected to remain broadly stable, except where there are increases due to locally concentrated pockets of housing growth. However, schools in this area attract some pupils from Carterton, where there will be significant housing growth, which may affect Burford schools. The growth in secondary school numbers is boosted by Burford School's popularity from outside the catchment area. The growing Carterton population may result in demand for places at Burford School being higher than shown in these forecasts.
All primary	1259	1283	1287	1272	1263	
Year 7	238	239	238	242	239	
All secondary	1395	1447	1469	1475	1464	

Comments on school capacity

The schools in this area report that pupil turnover rates, which historically have been high due to MoD redeployments, seem to be stabilising. Although there is not significant housing growth planned for this area, even relatively small-scale growth can exceed primary school capacity, due to the small sizes and lack of spare capacity in village schools. Following a recent development in Burford being approved on appeal, the county council is working with the Diocese on developing a scheme to expand Burford Primary School from an admission number of 15 to one of 20, but the school's site would not support further expansion.

The secondary school has been over-subscribed, and in response has increased its admission number, but much of this demand is from outside its catchment area. Given the spare capacity in some of the surrounding schools, the county council does not currently require additional secondary school places in this area.

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population. Additional capacity may be required to meet increased demand for places created by housing developments, particularly in Bampton, Clanfield and Brize Norton.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Burford	11	0	25	25	25	16	0	0	0	102	Shilton Road, Burford [91]; Frethern Close [11].
Bampton & Aston	50	88	80	68	68	25	0	0	0	379	New Road, Bampton [164; 125 in plan period]; N of Cote Road, Aston [41]; Saxel Close, Aston [38]; Mount Owen Road, Bampton [160]; Park Farm, Northmoor [15].
Minster Lovell	0	0	0	35	50	40	0	0	0	125	W of Minster Lovell [125].
Wychwoods	0	8	62	39	17	0	0	0	0	126	S of High Street [62]; S of Milton Road [44]; Churchill Farm, Churchill [10], Station Road, Kingham [10].
Total	61	96	167	167	160	81	0	0	0	732	

Burford

The West Oxfordshire Local Plan 2031 was accepted by the Planning Inspectorate in August 2018, and adopted by the council in September. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011-2031, including 2,750 as a contribution towards Oxford's unmet housing need. Housing completions in the period 2011-2018 totalled 2,538 dwellings, with the rate of completions increasing significantly in the last 2 years.

The Plan includes a housing distribution of: Witney and surrounding area - 4,702 homes (of which 600 had been completed by 2017 and a further 1,186 permitted); Carterton and surrounding area - 2,680 homes (of which 362 had been completed by 2017 and a further 1,591 permitted), including 700 at the east Carterton strategic site (permitted) and 500 at the REEMA strategic sites; Chipping Norton and surrounding area - 2,047 homes (of which 240 had been completed by 2017 and a further 419 permitted); Eynsham/Woodstock area - 5,596 homes (of which 547 had been completed by 2017 and a further 1,422 permitted); and Burford/Charlbury area - 774 homes all of which were already completed or permitted by 2017.

Carterton

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Carterton Primary School	Carterton	2252	COM	78	45	46	300	264	45	37	42	Admitted a "bulge" class in 2017 to address a shortage of Reception places. Pupil numbers have risen rapidly.
Edith Moorhouse Primary School	Carterton	2255	ACA	78	45	58	315	276	45	39	41	Converted to academy as part of River Learning Trust. Agreed to take over its admission number to address a shortage of Reception places for 2018. School provides early years places for 2 year olds under governors' powers.
Gateway Primary School	Carterton	2254	COM	0	45	45	351	280	45	36	43	Bright Start Pre-School open on site.
St John The Evangelist CE (VA) Primary School	Carterton	2613	VA	52	60	60	420	411	60	71	60	School opened in 2002.
St Joseph's Catholic (VA) Primary School	Carterton	3556	ACA	0	30	24	210	149	30	6	6	Part of Dominic Barberi Multi Academy Company. Nursery places may be restarted in 19/20.
Total for partnership				208	225	233	1596	1380	225	189	192	
% spare places						-4%		14%		16%	15%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Carterton Community College	Carterton	4041	COM	11-18	140	124	918	574	140	72	93	Shares site with Carterton Community College Playgroup.
% spare places						11%		37%		49%	34%	

Carterton

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	196	182	177	209	217	Due to turnover of MoD personnel, pupil numbers are unpredictable in this area. Primary school numbers in Carterton have grown faster than in other parts of Oxfordshire, and are forecast to continue to grow quickly due to large scale housing growth. Secondary pupil numbers will be slower to grow, and much of the impact of growth will be beyond this Plan period.
All primary	1433	1452	1448	1456	1462	
Year 7	99	103	115	129	137	
All secondary	564	566	574	609	628	

Comments on school capacity

All schools in Carterton are strongly affected by personnel movements at RAF Brize Norton. Previous years saw a lull in numbers at the base, and hence children for the schools. The phased closure of RAF Lyneham led to personnel moving to Brize Norton, and pupil numbers are now rising rapidly, albeit after a later start than initially expected due to a shortage of family accommodation in the town, which has resulted in families being housed in other towns and village. For 2017 and 2018 primary schools agreed to take over their admission numbers to ensure all children could be given a place. Pressure on places is forecast to stabilise, before increasing again from 2022 onwards, and additional primary school capacity will be required. This will be delivered through a new school to be built as part of the East Carterton strategic development; in addition, expansion of one or more of the existing primary schools may be required.

Carterton Community College currently has spare capacity, but pupil numbers will rise as a result of the higher pupil numbers transferring from primary school, as well as due to the significant housing development planned for the town. The school will need to increase its admission number in due course. There is some scope to do this within its existing buildings, but to meet the scale of housing growth proposed, physical expansion of the College's accommodation will become necessary, although probably not until beyond the period covered by this Pupil Plan.

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Burford	11	0	25	25	25	16	0	0	0	102	Shilton Road, Burford [91]; Frethern Close [11].
Carterton North	64	74	104	130	95	150	180	180	180	1157	Swinbrook Road [2 sites = 70+259; 208 in plan period]; Stanmore Crescent [81]; Linden House [28]; REEMA North and Central [219; 120 in plan period], REEMA North [200; 120 in plan period]; E of Carterton [700; 600 in plan period].

Carterton

Area (based on MSOA) - number of dwellings (cont)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Carterton South	2	0	0	0	40	40	40	40	40	202	Burford Road [14; 2 in plan period], Milestone Road [200].
Total	2	74	129	155	160	206	220	220	220	1461	

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The Plan includes a housing distribution of: Witney and surrounding area - 4,702 homes (of which 600 had been completed by 2017 and a further 1,186 permitted); Carterton and surrounding area - 2,680 homes (of which 362 had been completed by 2017 and a further 1,591 permitted), including 700 at the east Carterton strategic site (permitted) and 500 at the REEMA strategic sites; Chipping Norton and surrounding area - 2,047 homes (of which 240 had been completed by 2017 and a further 419 permitted); Eynsham/Woodstock area - 5,596 homes (of which 547 had been completed by 2017 and a further 1,422 permitted); and Burford/Charlbury area - 774 homes all of which were already completed or permitted by 2017.

Chipping Norton

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Chadlington CE Primary School	Chadlington	3043	VC	0	15	12	105	100	15	17	15	Pupil numbers have grown steadily in recent years.
Charlbury Primary School	Charlbury	2100	COM	0	30	26	210	192	30	33	31	Has been over-subscribed within catchment in some years. The feasibility of potential expansion to 1.5 form entry has been assessed, but will only be progressed if required as a result of local population growth. Has a detached playing field.
Enstone Primary School	Enstone	2103	COM	0	15	7	105	96	15	11	13	Very constrained site and accommodation. School has shared use of village hall building, including full-time accommodation for the Reception class. A recent building project provides flexibility for the school to admit 20 children per year group when necessary, but further investment would be required to make a higher intake sustainable on a permanent basis. Shares site with Enstone Pre-school.
Great Rollright CE (VA) Primary School	Great Rollright	3408	VA	0	15	11	105	102	15	14	21	Pupil numbers include a significant proportion of non-catchment children.
Great Tew Primary School	Great Tew	2104	COM	0	15	16	102	100	15	24	15	Pupil numbers include a significant proportion of non-catchment children. Shares site with Great Tew Pre-school.
Holy Trinity (VA) Catholic Primary School	Chipping Norton	3420	ACA	0	30	30	210	210	30	41	30	Part of Pope Francis Catholic Academy Company, with St Joseph's Catholic Primary and Blessed George Napier (secondary) School, both in Banbury.
Hook Norton CE Primary School	Hook Norton	3044	VC	52	45	37	315	230	45	37	38	Expanded from 1 form entry to 1.5 form entry - building work completed in 2017, ahead of housing development in area. Pupil numbers now rising.
Kingham Primary School	Kingham	2106	COM	52	30	30	208	203	30	20	21	

Chipping Norton

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Middle Barton School	Middle Barton	2151	ACA	0	25	21	175	135	25	24	25	Following a reassessment of accommodation the school's capacity had risen to 175, in line with an admission number of 25. Pupil numbers rising rapidly. Converted to academy in September 2018 as part of the River Learning Trust. Shares site with Middle Barton Pre-school.
St Mary's CE (VA) Primary School	Chipping Norton	3858	VA	0	60	29	345	254	60	34	38	School's current admission number is higher than that supported by its accommodation.
Total for partnership				104	280	219	1880	1622	280	255	247	
% spare places						22%		14%		9%	12%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Chipping Norton School	Chipping Norton	4010	ACA	11-18	240	179	1462	963	240	145	167	Shares site with Chipping Norton Pre-school. Part of the River Learning Trust.
% spare places						25%		34%		40%	30%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	251	223	198	192	201	Much of the impact of planned housing development in this area will affect schools after the period shown in this Plan. A lull in demand for primary school places is forecast ahead of the impact of new housing. Secondary school numbers are forecast to rise as cohorts affected by the earlier increase in birth rates reach secondary age.
All primary	1711	1738	1720	1674	1645	
Year 7	170	195	194	222	209	
All secondary	986	1035	1084	1166	1219	

Chipping Norton

Comments on school capacity

Primary school spare places are unevenly distributed, with many schools operating close to capacity. There is sufficient capacity within Chipping Norton town, but village schools are more full, often as a result of town families choosing village schools. Additional capacity has been provided through the recent expansion of Hook Norton Primary School, which will also assist with pressure from surrounding areas such as Bloxham. The planned strategic development at Chipping Norton will require a new primary school; the size and timing of this will take into account current availability of capacity at existing schools. The secondary school is expected to have sufficient capacity, but this will be affected by the balance of supply and demand for places in surrounding areas.

Nursery School

The ACE Nursery School is a community Nursery School run by the county council. It offers 78 part time equivalent places for pupils aged 3 to 5.

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments, particularly in Chipping Norton.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Charlbury, North Leigh	0	79	85	60	0	0	0	0	0	224	N of Little Lees, Charlbury [22]; S of Forest Road, Charlbury [25]; Woodstock Road, Charlbury [11]; N of New Yatt Road, North Leigh [40]; S of New Yatt Road, North Leigh [76]; Witney Road, North Leigh [50].
Chipping Norton	107	75	44	65	85	75	75	100	100	726	Walterbush Rd [228; 201 in plan period]; S of Banbury Road [100]; Tank Farm [1100; 425 in plan period].
Enstone & Kingham	10	16	10	8	0	0	0	0	0	44	S of Church Street, Kingham [16]; New Road, Kingham [10]; Quarrhill Close, Over Norton [18].
West Cherwell	53	26	55	20	0	0	0	0	0	154	SW of Tadmarton Road, Bloxham [60]; N of The Green, Milcombe [40]; S of Redland Farm, Hook Norton [54].
Woodstock, Stonesfield, Bladon, Tackley	41	33	98	101	75	95	75	80	50	648	NE of Marlborough School [58]; Charity Farm, Stonesfield [37; 27 in plan period]; Home Farm, Bladon [27; 18 in plan period]; Nethercote Rd, Tackley [2 sites = 70+26]; E of Woodstock [300], N of Banbury Road [180], N of Hill Rise [120]; E of Farley Corner [12; 7 in plan period], Stonesfield [37].

Chipping Norton

Area (based on MSOA) - number of dwellings (cont)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Wychwoods	0	8	62	39	17	0	0	0	0	126	S of High Street [62]; S of Milton Road [44]; Churchill Farm, Churchill [10], Station Road, Kingham [10].
Total	211	237	354	293	177	170	150	180	150	1922	

This partnership is affected by the planning policies of both the West Oxfordshire and Cherwell District Councils.

The West Oxfordshire Local Plan 2031 was accepted by the Planning Inspectorate in August 2018, and adopted by the council in September. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011-2031, including 2,750 as a contribution towards Oxford's unmet housing need. Housing completions in the period 2011-2018 totalled 2,538 dwellings, with the rate of completions increasing significantly in the last 2 years.

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The Cherwell Local Plan 2011-2031 was adopted in July 2015. The Plan focuses housing growth on Bicester (9,764 new homes between 2014 and 2031) and Banbury (7,106 new homes), with a further 4,864 new homes across the rest of the district. For rural areas, in addition to strategic growth of 2,361 new homes at Upper Heyford, the Plan expects a further 750 homes to be delivered through developments of 10 or more homes across the most sustainable villages: Adderbury, Ambrosden, Arncott, Begbroke, Bletchington, Bloxham, Bodicote, Chesterton, Cropredy, Deddington, Finmere, Fringford, Fritwell, Hook Norton, Kidlington, Kirtlington, Launton, Milcombe, Sibford Ferris/Gower, Steeple Aston, Weston on the Green, Wroxton and Yarnton. Sites will be identified through the preparation of the Local Plan Part 2, through the preparation of Neighbourhood Plans where applicable, and through the determination of applications for planning permission.

Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need. The proposed distribution is for 1,180 homes across 2 sites in North Oxford; 330 homes across 2 sites south of Kidlington; 2,390 across Begbroke and Yarnton and 500 south east of Woodstock. The Planning Inspector issued a preliminary advice note in July 2019, proposing modifications to the Plan. CDC will be carrying out further work to respond to this, and hope to submit a modified Plan by the end of 2019. This is not expected to affect schools in this planning area. The current pupil forecasts include only the housing numbers in the adopted Local Plan, and permitted sites.

Cumnor

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Appleton CE (VA) Primary School	Appleton	3850	VA	0	28	18	196	183	28	30	28	School changed their published admission number from 26 to 28 from Sept 2018. Attracts pupils from a wide area.
Botley School	Botley	2569	COM	80	60	50	420	356	60	43	47	Expanded to 2 form entry.
Cumnor CE School	Cumnor	3223	VC	0	30	30	209	210	30	37	30	Initial assessment has been made of potential to expand, but complicated by constrained site access. Shares site with Cumnor Pre-school Nursery.
North Hinksey CE Primary School.	North Hinksey	3237	ACA	0	30	30	210	206	30	33	30	Shares site and building with North Hinksey Pre-School and Childcare Clubs. Part of the Oxford Diocesan Schools Trust (ODST).
St Swithun's CE Primary School	Kennington	3258	VC	52	60	58	420	392	60	55	56	Expanded from 1.5 form entry to 2 form entry. Has previously admitted significant numbers of pupils from outside catchment, especially from Oxford, but as Local Plan housing growth in the area increases the village population, there will be a reduction in (new) non-catchment pupils. Shares site with the Kennington Playgroup located in a separate block.
West Oxford Community Primary School	Oxford	2533	COM	52	30	27	205	205	30	26	26	For some years was over-subscribed from within catchment, but local population pressure has now subsided.
Total for partnership				184	238	213	1660	1552	238	224	217	
% spare places						11%		7%		6%	9%	

Cumnor

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Matthew Arnold School	Oxford	4128	ACA	11-18	210	207	1250	1176	210	245	210	Expanded by 1 form of entry as of Sept 2017, increasing admission number from 180 to 210. Building work is due to complete 2019.
% spare places												
						1%		6%		-17%	0%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	221	216	213	213	220	Forecasts indicate that recent pressure on primary school places has eased slightly, partly as a result of a previous shortage of places within Oxford city being resolved. A sustained increase in demand for secondary school places is forecast from 2022 onwards, but this will need to be reviewed once the impact of the new Swan School in Oxford can be fully assessed.
All primary	1586	1605	1620	1623	1620	
Year 7	210	210	210	232	234	
All secondary	1217	1258	1309	1362	1410	

Comments on school capacity

Several primary schools have been expanded in response to a previous shortage of places in this area, and to meet the needs of planned and proposed housing growth, but the level of spare places is forecast to remain relatively low. There are no remaining straightforward solutions to expanding capacity at these schools, and therefore should there be further growth in demand, in some years pupils may be displaced to surrounding areas.

The combined effect of rising pupil numbers already at primary school in this area and local housing growth has required an increase in secondary school capacity, and Matthew Arnold School is expanding by one form of entry in the first instance. Longer term, it may become necessary to review whether the school could expand by another form of entry, but this will be reviewed once the impact of the new secondary school in Oxford, opening 2019, is apparent.

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments, particularly in Appleton and Cumnor.

Cumnor

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Cumnor	7	11	11	12	0	0	0	0	0	41	Cumnor Hill [12]; W of Faringdon Road [22]; Tilbury Lane [150; 7 in plan period].
Hinksey	0	10	61	190	180	50	50	33	0	574	Botley Centre Site A [128]; Botley Centre Site B [132]; West Way [11]; North Hinksey Lane [20]; South of Kennington Site 3 [283].
Total	7	21	72	202	180	50	50	33	0	615	

The Vale of White Horse (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for 'at least' 20,560 homes, including: Abingdon (1150); Kennington (270); Radley (240); Sutton Courtenay (220); Kingston Bagpuize (280); Didcot Valley Park (2,550); NW of Valley Park (800); Milton Heights (400); Harwell (200); Crab Hill Wantage (1500); Monks Farm Grove (885); Stanford in the Vale (200); Faringdon & Coxwell (950); and Shrivenham (500). In addition, 2,500 homes at Grove Airfield were carried forward from the 2011 Local Plan.

On 9 October 2019, the council voted to adopt their Local Plan Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to include 2,200 as its contribution towards addressing Oxford's Unmet Need. Of these, by March 2018 6,300 had been completed and 13,387 more were already permitted. In addition to the Local Plan Part 1 allocations, the Part 2 Plan adds allocations of 130 homes in East Hanney (2 sites); a further 600 in Kingston Bagpuize with Southmoor, 90 to the south-east of Marcham, 1,200 at Dalton Barracks to the west of Abingdon, and a further 400 homes north-west of Grove (with the potential for further growth post-2031).

The current pupil forecasts include only the housing numbers in the previously adopted Local Plan Part 1 and not the increases now included in the Local Plan Part 2, unless they are already permitted sites.

Schools in this area are also affected by Oxford city housing (see Oxford section).

Didcot

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
All Saints CE (VA) Primary School	Didcot	3859	VA	52	60	48	420	394	60	48	56	
Aureus Primary School	Didcot	2011	ACA	60	60	45	420	75	60	56	60	New school opened in September 2018 as part of the GLF Schools MAT. Pupil numbers still growing - for 2019/20 academic year, classes up to Year 3 are operating.
Blewbury Endowed CE Primary School	Blewbury	3248	VC	0	25	25	175	162	25	5	7	School is thought to have potential to expand to a capacity of 210 if justified by local population.
Chilton County Primary School	Chilton	2555	COM	26	45	40	315	247	45	44	45	Expanded from an admission number of 30 to meet the needs of the growing local population. Total expanded capacity shown; apparent spare capacity relates to older year groups where an admission number of 30 still applies.
GEMS Didcot Primary Academy	Didcot	2012	ACA	52	60	60	420	239	60	75	60	School opened Sept 2016 with Nursery, Reception, Year 1 and Year 2. Operating at or close to capacity in all open year groups; apparent spare capacity relates to year groups not yet operating. Part of the GEMS Learning Trust.
Hagbourne CE Primary School	East Hagbourne	3249	VC	0	30	30	204	207	30	34	30	
Harwell Community Primary School	Harwell	2563	COM	0	30	29	210	199	30	40	30	Pupil numbers have risen rapidly. Potential for permanent expansion to 1.5 form entry explored but this school would be difficult and expensive to expand. To be kept under review as the scale of housing growth both for Harwell village and for Harwell Science & Innovation Campus is confirmed, and in the context of expanding and new schools in the surrounding area.
Ladygrove Park Primary School	Didcot	2609	ACA	26	60	60	420	421	60	71	60	Academy is part of the Oxford Primary Education Network "umbrella trust".

Didcot

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Long Wittenham CE Primary School	Long Wittenham	3233	VC	0	15	13	105	90	15	14	17	School working with partners to investigate possibility of relocation.
Manor School	Didcot	2028	ACA	0	75	45	525	411	60	31	30	Academy is part of the GLF Schools MAT. Shares site with Ladybird Pre-school. The academy previously had a PAN of 75 but has now reduced this to 60 pupils per year group, and pupil numbers are falling.
Northbourne CE (VA) Primary School	Didcot	3852	ACA	52	45	45	315	308	45	37	45	Part of the Oxford Diocesan Schools Trust (ODST).
South Moreton School	South Moreton	2566	ACA	0	25	17	175	153	25	21	25	Converted to academy in June 2017 as part of Oxford Diocesan Schools Trust (ODST). Shares site with South Moreton Pre-school.
Stephen Freeman Community School	Didcot	2594	COM	52	60	17	420	389	60	44	53	Extended to 2 forms of entry from 2014 as the first step in providing school capacity for the Great Western Park development. Pupil numbers rising rapidly. Butterflies Pre-school in former Childrens Centre space.
Willowcroft Community School	Didcot	3912	ACA	78	60	59	420	370	60	50	53	Academy is part of the Oxford Primary Education Network "umbrella trust". Pupil numbers rising rapidly. Places for 2 year olds provided under governors' powers.
Total for partnership				398	650	533	4544	3665	635	570	571	
% spare places						18%		19%		10%	10%	

Didcot

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Aureus School	Didcot	4004	ACA	11-16	240	200	1200	317	240	176	199	New school opened in Sept 2017 at Great Western Park housing development, initially with admission number 120. Apparent spare capacity relates to year groups not yet operating. Part of GLF Schools MAT. Co-located with UTC Oxfordshire.
Didcot Girls' School	Didcot	4139	ACA	11-18	300	297	1542	1423	270	406	270	School has increased admission number to 270, and took a bulge class in 2018, to meet demand. Part of the Ridgeway Education Trust. Shares sixth form with St Birinus School.
St Birinus School (Boys)	Didcot	4129	ACA	11-18	180	129	1467	850	180	150	175	Admission number reduced from 210 in Sept 2018, but has potential to increase again as local population grows. Part of the Ridgeway Education Trust. Shares sixth form with Didcot Girls' School.
UTC Oxfordshire	Didcot	4008	ACA	14-19	150 in Year 10	124 in Year 10	600	360	150 in Year 10	92 in Year 10	92 in Year 10	Opened in 2015, pupil numbers still growing. Allocation number is as reported by the academy.
Total for partnership					720	626	4809	2950	690	732	644	
% spare places						13%		39%		-6%	7%	

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Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	592	656	640	602	655	Large scale housing growth is leading to rapid growth in pupil numbers. The new secondary school in particular is changing patterns of pupil movement by providing another option, and has reduced pressure at schools in adjoining areas. Much of the housing growth planned for Didcot will not have affected pupil numbers during the period covered by this Pupil Plan.
All primary	3891	4177	4441	4574	4730	
Year 7	644	662	683	790	773	
All secondary	3278	3582	3872	4217	4464	

Didcot

Comments on school capacity

The scale of new housing planned for Didcot will require the addition of up to 7 new primary schools and 3 secondary schools by 2030. These have already started to open, with the UTC opening in 2015; GEMS Didcot Primary Academy opening in 2016; Aureus (secondary) School opening in 2017; and Aureus Primary School in 2018. The next new primary school will be needed in the early 2020s, but the date of opening is to be confirmed, subject to the progress of the NE Didcot housing development providing the site. In the meantime, there is forecast to be pressure on Reception places in 2020. NE Didcot will also include a secondary school, which is unlikely to open before the mid-2020s. In the meantime, pressure on secondary school places is forecast from 2022 onwards, which would need to be met either through increases in admission numbers at existing schools, or through displacement of pressure to surrounding areas.

A new special school is also planned for Didcot, focussing on Social, Emotional & Mental Health Needs and Autism. A "Free School" process is underway during 2019 to identify an academy sponsor for this school. It is hoped that the new school can open by 2022/2023, but this is dependent on land availability. In the longer term, a further new special school may be required, to meet the scale of planned housing growth in south Oxfordshire.

Nursery School

Lydalls in Didcot is a 120 part time equivalent place Maintained Nursery School for 2-5 year olds.

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. In Northbourne and Harwell wards there are insufficient places for children to access their entitlement locally. Additional capacity will be required to meet increased demand for places created by housing developments. The new schools planned in the area will include nursery classes.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Didcot North East	0	27	62	161	179	187	293	267	292	1468	S of Hadden Hill [74]; Ladygrove East [642; 195 in plan period]; NE Didcot [1880; 1199 in plan period].
Didcot West	431	492	544	620	586	462	570	550	550	4805	Great Western Park [2604; 1155 in plan period]; S of A4130 [166]; Didcot A Power Station [2 sites = 120+280; 270 in plan period]; Didcot Gateway South [300]; Didcot Road [760; 514 in plan period]; North West Valley Park [800]; Valley Park [4254; 1600 in plan period].
Didcot South East	0	0	0	0	0	0	0	0	0	0	
Didcot South	154	0	0	0	0	0	0	0	0	154	Park Road [154].
North of Didcot	0	10	35	168	188	187	228	202	227	1245	NE Didcot [1880; 1199 in plan period]; Fieldside Track, Long Wittenham [36].

Didcot

Area (based on MSOA) - number of dwellings (cont)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Cholsey & the Hagbournes	0	27	27	96	67	13	0	0	0	230	Cholsey: East End Farm [67]; Celsea Place [60]; Cholsey Meadows [14]; N of Charles Road [15]. East Hagbourne: Main Road [74].
Drayton, Steventon, Sutton Courtenay, Milton	156	152	182	171	128	60	110	110	110	1179	Drayton: Halls Close [28]; Manor Farm [57]; S of High Street [140]. Steventon: Hanney Road [44]; Abingdon Road [57; 15 in plan period]; Barnett Road [65]; Sutton Courtenay: South of Appleford Road [2 phases; 95+100; 192 in the plan period]; E of Sutton Courtenay [200; 150 in plan period]; Milton: Milton Hill [53]; Milton Heights [458; 435 in plan period].
Harwell, Hendreds	138	91	106	88	69	1	0	0	0	493	Harwell: Reading Road [16]; Didcot Road [19]; S of Blenheim Hill [80; 60 in plan period]; N of Grove Road [207]. East Hendred: N of Portway Villas [26; 12 in plan period]; E of Portway Cottages [46]; Mather House & Greensands [75]. Blewbury: Bessels Way [30; 22 in plan period]. Chilton: Manor Close [18]. Milton: Drayton Road [18].
Total	879	799	956	1304	1217	910	1201	1129	1179	9574	

Didcot

This partnership is affected by the planning policies of both the Vale of White Horse (VOWH) and South Oxfordshire (SODC) District Councils. Didcot has been a designated growth area since 1979 and it is the main focus for housing growth in South Oxfordshire. Didcot was awarded Garden Town status by the government in December 2015.

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 12 larger villages.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

The Vale of White Horse (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for 'at least' 20,560 homes, including: Abingdon (1150); Kennington (270); Radley (240); Sutton Courtenay (220); Kingston Bagpuize (280); Didcot Valley Park (2,550); NW of Valley Park (800); Milton Heights (400); Harwell (200); Crab Hill Wantage (1500); Monks Farm Grove (885); Stanford in the Vale (200); Faringdon & Coxwell (950); and Shrivenham (500). In addition, 2,500 homes at Grove Airfield were carried forward from the 2011 Local Plan.

On 9 October 2019, the council voted to adopt their Local Plan Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to include 2,200 as its contribution towards addressing Oxford's Unmet Need. Of these, by March 2018 6,300 had been completed and 13,387 more were already permitted. In addition to the Local Plan Part 1 allocations, the Part 2 Plan adds allocations of 130 homes in East Hanney (2 sites); a further 600 in Kingston Bagpuize with Southmoor, 90 to the south-east of Marcham, 1,200 at Dalton Barracks to the west of Abingdon, and a further 400 homes north-west of Grove (with the potential for further growth post-2031).

The current pupil forecasts include only the housing numbers in the previously adopted Local Plan Part 1 and not the increases now included in the Local Plan Part 2, unless they are already permitted sites.

Eynsham

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Eynsham Community Primary School	Eynsham	2013	ACA	20	60	30	420	323	60	28	28	Shares a site with Eynsham Pre-school. Part of the Eynsham Partnership MAT.
Freeland CE Primary School	Freeland	3208	ACA	0	22	18	157	145	22	11	13	Capacity significantly depends on temporary classrooms. Shares a constrained site with Freeland Pre-school. Part of the Eynsham Partnership MAT.
Hanborough Manor CE School	Long Hanborough	3147	ACA	0	30	27	210	201	30	28	28	Expansion to 1.5 form entry is planned for 2020/21 to meet the needs of significant local housing development. Further expansion to 2 form entry may be required in the longer term. Hanborough Meadows Preschool (formerly Long Hanborough Playgroup) has now relocated from the primary school site to new purpose-built accommodation in a local housing development. Part of the Eynsham Partnership MAT.
St Peter's CE Primary School	Cassington	3651	ACA	15	15	14	105	96	15	6	6	Part of the Eynsham Partnership MAT.
Standlake CE Primary School	Standlake	3127	ACA	26	24	17	168	132	24	13	14	Admission number increased from 20 to 24 in 2015, due to an additional classroom being constructed. Part of the Eynsham Partnership MAT.
Stanton Harcourt CE Primary School	Stanton Harcourt	3130	ACA	15	15	11	105	99	15	16	15	Options have been assessed to expand the school to accommodate an admission number of 20, if required by local population growth. Part of the Eynsham Partnership MAT.
Total for partnership				76	166	117	1165	996	166	102	104	
% spare places						30%		15%		39%	37%	

Eynsham

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bartholomew School	Eynsham	4054	ACA	11-18	210	204	1300	1274	210	210	210	Capacity increased following a recent capital project to add accommodation. Potential being explored for further expansion in the longer term, in response to the housing growth planned at Eynsham, which would require an additional site. Part of the Eynsham Partnership MAT.
% spare places						3%		2%		0%	0%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	111	124	140	128	137	Much of the impact of the planned housing growth in this area will be felt beyond the period covered by this Plan. Significant growth in pupil numbers is therefore expected in the longer term.
All primary	1011	1023	1047	1039	1053	
Year 7	210	210	210	236	221	
All secondary	1298	1339	1366	1410	1439	

Comments on school capacity

All schools in this partnership belong to the same multi-academy trust. Several schools in this area have previously needed to expand as a result of local population growth. Further expansion will be necessary as a result of housing growth.

The WODC Local Plan includes a new garden village north of Eynsham, as well as a large housing development to the west of Eynsham. These will require new primary schools, and would also be required to provide an additional site for secondary education. The county council is working with WODC to plan how the necessary capacity can best be provided.

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population. Additional capacity will be required in response to population growth from planned housing developments.

Eynsham

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Eynsham	16	15	119	124	273	295	295	345	345	1827	Eynsham Nursery [77]; W of Thornbury Road, Eynsham [160]; Newland Street, Eynsham [13], Southfield Road, Eynsham [16]; W of Eynsham [763; 400 in plan period], Oxfordshire Cotswolds Garden Village [2200; 1100 in plan period]; Main Road, Stanton Harcourt [61].
Hanborough & Freeland	0	86	159	121	49	0	0	25	25	465	Witney Road, Freeland [41]; Church Road, Hanborough [50]; S of A4095, Hanborough [169]; S of Hanborough Station [120]; Oliver's Garage, Long Hanborough [25], Manor Farm, Cassington [10], Myrtle Farm, Long Hanborough [50].
Total	16	101	278	245	322	295	295	370	370	2292	

The West Oxfordshire Local Plan 2031 was accepted by the Planning Inspectorate in August 2018, and adopted by the council in September. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011-2031, including 2,750 as a contribution towards Oxford's unmet housing need. Housing completions in the period 2011-2018 totalled 2,538 dwellings, with the rate of completions increasing significantly in the last 2 years.

The Plan includes a housing distribution of: Witney and surrounding area - 4,702 homes (of which 600 had been completed by 2017 and a further 1,186 permitted); Carterton and surrounding area - 2,680 homes (of which 362 had been completed by 2017 and a further 1,591 permitted); Chipping Norton and surrounding area - 2,047 homes (of which 240 had been completed by 2017 and a further 419 permitted); Eynsham/Woodstock area - 5,596 homes (of which 547 had been completed by 2017 and a further 1,422 permitted), including 2,200 at the Garden Village, 1,000 at the west Eynsham strategic site (including 237 already permitted at Eynsham Nursery and Thornbury Road) and 670 across three sites in Woodstock (300 of which are already permitted); and Burford/Charlbury area - 774 homes all of which were already completed or permitted by 2017.

Faringdon

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Ashbury with Compton Beauchamp CE (VA) Primary School	Ashbury	3851	VA	0	15	6	90	67	15	9	9	Governor-run early years provision.
Buckland CE Primary School	Buckland	3222	ACA	11	15	15	105	107	15	23	15	Part of the Faringdon MAT.
Faringdon Infant School	Faringdon	2561	ACA	52	90	83	270	248	75	63	69	Part of the Faringdon MAT. 2 separate schools, with pupils transferring from the Infant School to the Junior School in Year 3. Since September 2018, some Reception pupils have been legally enrolled at the "Junior" school as a precursor to a planned conversion of both schools to primary schools, but they are being taught with Reception pupils enrolled at the Infant school. Jointly, the schools have been offering 90 places per year group, but for 2019 this was reduced to 75, until difficulties with accommodation are resolved.
Faringdon Junior School	Faringdon	2562	ACA	0			360	337				
John Blandy Primary School	Southmoor	3230	ACA	0	30	29	210	204	40	39	40	Part of the Faringdon MAT. Rapid growth in pupil numbers has required expansion to 1.5 form entry, due to local housing growth. Admission number will increase further to 45 once accommodation is complete. Southmoor Pre-school is based on school site.
Longcot & Fernham CE School	Longcot	3232	ACA	16	20	20	119	130	20	28	20	Part of the Faringdon MAT. School has increased admission number from 17 to 20.

Faringdon

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Longworth Primary School	Longworth	3234	VC	0	10	5	70	71	10	13	13	Longworth Pre-school co-located on school's site. Expansion to 0.5FE (PAN 15) is proposed for 2020.
Shellingford CE (VA) School	Shellingford	3853	VA	0	15	14	105	95	15	9	15	Rapid growth in pupil numbers in recent years.
Shrivenham CE Primary School	Shrivenham	3239	ACA	0	30	30	210	187	30	21	23	Part of the Faringdon MAT. Pupil numbers fluctuate due to proximity to Defence Academy. School's current site does not support expansion, and an additional site has been sought related to local housing development. Shares a site with The Barn Kindergarten, which delivers early years provision.
Watchfield Primary School	Watchfield	2572	ACA	26	60	52	420	331	60	54	55	Part of the Faringdon MAT. Pupil numbers fluctuate, due to proximity to Defence Academy and the school receives a significant portion of its intake as late applicants. Sometimes admits over its admission number into Reception, as pupil numbers generally decline over subsequent years as families move away again, so spare places are concentrated in older year groups.
Total for partnership				105	285	254	1959	1777	280	259	259	
% spare places						11%		9%		8%	8%	

Faringdon

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Faringdon Community College	Faringdon	4141	ACA	11-18	240	237	1525	1230	270	257	266	Part of the Faringdon MAT. A new building opened in September 2018, expanding the school to 9 form entry. Pupil numbers expected to rise rapidly.
% spare places						1%		19%		5%	1%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	267	289	273	278	290	The recent extreme pressure on Reception places has temporarily eased, but growth in demand for primary school places is forecast to resume from 2020 onwards, and expansion of schools will be required. The planned expansion of Faringdon Community College is only expected to be sufficient for housing already permitted; any further significant housing growth in the college's catchment area is likely to result in some pupils being displaced to surrounding schools. The current forecasts shown here do not yet include the 600-home strategic site proposed in the VOWH Local Plan Part 2 for Kingston Bagpuize.
All primary	1855	1932	1943	1962	1995	
Year 7	266	270	270	270	270	
All secondary	1310	1396	1453	1510	1532	

Comments on school capacity

There has been sustained pressure on primary school places in this area. Expansion of capacity has been implemented through school expansions where feasible, but significant further expansion in Faringdon itself is dependent on the progress of the Park Road housing development, which will include a new primary school building. It is intended that the current Infant School will relocate to the new site, enabling it to grow to a 2 form entry primary school; the current Junior School will also become a primary school, a process which started with its initial Reception intake in 2018. The scale of planned and proposed housing development in Shrivenham will require expansion of the village school, which is on a constrained site. The county council is working with a local housing developer to secure a new site for the school to enable its expansion. John Blandy School is also expanding to meet the needs of housing development. Until all planned expansions can be completed, pressure on primary school places is likely to remain.

The expansion of Faringdon Community College should provide sufficient capacity for catchment population growth based on current Local Plan housing allocations, but significant further housing growth may exceed the school's ability to admit children, and result in some applicants being displaced to surrounding schools.

Faringdon

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population overall. Additional capacity will be required in response to population growth from planned housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Faringdon	75	175	251	277	210	90	40	40	40	1198	Faringdon: SW of Faringdon [190]; S of Park Road [322+103, 268 in plan period]; W of Coxwell Road [200]; Bromsgrove [10], Southampton Street [11]; Lechlade Road [14]; Fernham Fields [2 sites; 111+89]. Great Coxwell: Fernham Gate [10]; Chowle Farm Industrial Estate [21]; Fernham Road [25]. Stanford in the Vale: W of Stanford in the Vale [22]; Penstones Farm [18]; Bow Farm [2 sites; 20+19]; W of Faringdon Road [100]; N of Ware Road [78].
South West Vale, Shrivenham, Watchfield	125	120	228	198	105	100	100	55	0	1031	Shrivenham: Recreation Ground [11]; Highworth Road [2 sites; 275+35]; E of Highworth Road [240+36; 262 in plan period]; W of Longcot Road [63], Colton Road [68; 39 in plan period]; Townsend Road [116]; Longcot: King's Lane [15]; Watchfield: Majors Road [16]; Cowans Camp [3 sites; 33+100+100; 122 in plan period]; East Challow: Challow Park [38]; Park Farm [88].

Faringdon

Area (based on MSOA) - number of dwellings (cont)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Kingston Bagpuize & Southmoor	139	128	133	103	61	50	20	0	0	634	Kingston Bagpuize: E of Witney Road [280]; Field Close [2 sites; 73+11; 74 in plan period]; Sports Pavilion [30]; Springfield Farm [25]; Abingdon Road [30]. Southmoor: Southmoor House [10]; Fallowfields Hotel [31]; Fallowfields [43]. West Hanney: School Road [15]. East Hanney: Steventon Road [39]; Steventon Road Nurseries [40]; N of Summertown [55].
Total	339	423	612	578	376	240	160	95	40	2863	

The Vale of White Horse (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for 'at least' 20,560 homes, including: Abingdon (1150); Kennington (270); Radley (240); Sutton Courtenay (220); Kingston Bagpuize (280); Didcot Valley Park (2,550); NW of Valley Park (800); Milton Heights (400); Harwell (200); Crab Hill Wantage (1500); Monks Farm Grove (885); Stanford in the Vale (200); Faringdon & Coxwell (950); and Shrivenham (500). In addition, 2,500 homes at Grove Airfield were carried forward from the 2011 Local Plan.

On 9 October 2019, the council voted to adopt their Local Plan Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to include 2,200 as its contribution towards addressing Oxford's Unmet Need. Of these, by March 2018 6,300 had been completed and 13,387 more were already permitted. In addition to the Local Plan Part 1 allocations, the Part 2 Plan adds allocations of 130 homes in East Hanney (2 sites); a further 600 in Kingston Bagpuize with Southmoor, 90 to the south-east of Marcham, 1,200 at Dalton Barracks to the west of Abingdon, and a further 400 homes north-west of Grove (with the potential for further growth post-2031).

The current pupil forecasts include only the housing numbers in the previously adopted Local Plan Part 1 and not the increases now included in the Local Plan Part 2, unless they are already permitted sites.

Henley

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Badgemore Primary School	Henley	2513	COM	0	30	6	210	89	30	9	14	School has expanded from 0.5 form entry to 1 form entry. New PVI early years provider within school buildings.
Sacred Heart (VA) Catholic Primary School	Henley	3820	VA	0	30	19	210	172	30	19	24	Shares site with Sacred Heart Pre-school.
Shiplake CE (VA) Primary School	Shiplake	3810	VA	0	28	11	196	169	28	13	14	School is on a very small site, and does not have potential to expand. School took over Shiplake Village Nursery provision in Memorial Hall under Govenors' powers.
Trinity CE Primary School	Henley	3254	VC	0	45	45	315	303	45	45	45	School has potential to expand to 2 form entry, if required by local population growth. Currently has significant temporary accommodation. Shares site with Trinity Pre-school.
Valley Road School	Henley	2512	COM	0	30	30	210	202	30	45	30	School changed its age range from 3-11 to 4-11 from September 2019. On site nursery provision has been consolidated under a private provider (Cygnetts of Henley), which was already operating on site. Arrangements for integrated provision with the nursery of Bishopswood (Special) School will be maintained.
Total for partnership				0	163	111	1141	935	163	131	127	
% spare places						32%		18%		20%	22%	

Henley

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Gillotts School	Henley	4055	ACA	11-16	180	178	900	860	180	246	200	Also attracts pupils from outside the county. For 2020 onwards, the school's designated area is extending into Buckinghamshire, to help address pressure on school places there.
% spare places						1%		4%		-37%	-11%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	125	128	124	124	121	Demand for primary school places in this area has been unpredictable in recent years. Because pupil numbers have been falling in recent years, the planned housing development in Henley is not expected to result in an overall rise in demand for school places. Forecasts for secondary school numbers are complicated by proximity to the county border. Pupil forecasts shown assume the flow of non-Oxfordshire pupils is constant, but this will depend on the balance of supply and demand for places in surrounding areas.
All primary	928	938	912	894	869	
Year 7	200	180	211	205	194	
All secondary	901	920	960	991	1005	

Comments on school capacity

Primary School catchment areas were reviewed 2017. The county council is not currently seeking to commission more school places in this area, as school capacity is expected to be sufficient given the recent expansion of Badgemore Primary School, but this will be reviewed should population or housing development grow faster than expected. The current admission number of the secondary school is forecast to be sufficient to meet local demand, but the school may be oversubscribed from outside its designated area.

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population. Additional capacity will be required in response to population growth from planned housing developments.

Henley

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Henley North	10	29	12	26	103	28	23	0	0	231	Empstead Works [42]; Henley Youth Club [23]; Chiltern's End [27]; W of Fair Mile [40]; Wilkins Yard [23]; Smith Centre [36]; Market Place Mews [14], Greys Road [16], Friday Street [10].
Henley South	0	23	18	8	62	26	0	0	0	137	Reading Road [2 sites = 30+23]; Newtown Road [11]; Gillotts School [50]; Station Road [23].
Shiplake	0	60	60	70	27	27	14	0	0	258	Highlands Farm, Rotherfield Greys [163]; Thames Farm, Shiplake [95].
Total	10	112	90	104	192	81	37	0	0	626	

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 12 larger villages.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 807 homes from the revised neighbourhood plans at Henley-on-Thames, Thame, Sonning Common, and Woodcote, and 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Kidlington

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Dr South's CE (VA) Primary School	Islip	3655	ACA	30	15	15	105	102	15	18	15	Converted to academy as part of Oxford Diocesan (ODST).
Edward Feild Primary School	Kidlington	2590	COM	0	60	45	386	309	60	39	42	Expanded to 2 form entry permanently in 2017, having previously accepted "bulge" classes, and an additional classroom will be required in due course. School leases space to Robin Preschool.
North Kidlington School	Kidlington	2357	COM	0	45	45	315	291	45	43	44	Capacity significantly depends on temporary classrooms. Shares site with Magpies Pre-school.
St Thomas More Catholic Primary School	Kidlington	3823	ACA	60	30	25	210	174	30	27	27	Part of Dominic Barberi MAT.
West Kidlington Primary School	Kidlington	2021	ACA	60	60	38	420	340	60	56	56	Part of the White Horse Federation. Shares site with SKIPS Pre-school.
Total for partnership				150	210	168	1436	1216	210	183	184	
% spare places						20%		15%		13%	12%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Gosford Hill School	Kidlington	4060	ACA	11-18	180	147	1221	883	180	121	167	School site offers potential to increase admission number if required by local population growth. Pupil numbers would increase in due course if the housing proposed in the Cherwell Local Plan Partial Review is implemented.
% spare places						18%		28%		33%	7%	

Kidlington

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	185	172	163	161	159	Forecasts do not yet include the large-scale housing growth proposed, but not yet confirmed, for this area within the Cherwell Local Plan Partial Review. As well as proposed housing in Kidlington, this area would also be affected by the proposed allocation in Begbroke/Yarnton, especially for secondary pupils.
All primary	1230	1243	1209	1174	1149	
Year 7	167	133	160	162	154	
All secondary	921	902	913	918	915	

Comments on school capacity

Although current school capacity appears to be sufficient based on the pupil forecasts above, the proposals in the Cherwell Local Plan Partial Review would affect this area, and require new schools in Begbroke/Yarnton, as well as potentially the expansion of some existing schools. The county council is working with Cherwell District Council, as well as with the affected schools, to plan the most appropriate solutions to providing sufficient school places in this area, which will also be influenced by the balance of supply and demand for school places in surrounding areas.

Early Years Free Entitlement

Early years provision across this area currently meets the need of the local population. Additional capacity will be required in response to population growth from planned housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Kidlington North	0	0	8	44	0	0	0	0	0	52	Co-op [52].
Kidlington South	0	0	0	0	0	0	0	0	0	0	
Yarnton	0	0	16	0	0	0	0	0	0	16	Cassington Road [16].
Total	0	0	24	44	0	0	0	0	0	68	

Kidlington

The Cherwell Local Plan 2011-2031 was adopted in July 2015. The Plan focuses housing growth on Bicester (9,764 new homes between 2014 and 2031) and Banbury (7,106 new homes), with a further 4,864 new homes across the rest of the district. For rural areas, in addition to strategic growth of 2,361 new homes at Upper Heyford, the Plan expects a further 750 homes to be delivered through developments of 10 or more homes across the most sustainable villages: Adderbury, Ambrosden, Arncott, Begbroke, Bletchingdon, Bloxham, Bodicote, Chesterton, Cropredy, Deddington, Finmere, Fringford, Fritwell, Hook Norton, Kidlington, Kirtlington, Launton, Milcombe, Sibford Ferris/Gower, Steeple Aston, Weston on the Green, Wroxton and Yarnton. Sites will be identified through the preparation of the Local Plan Part 2, through the preparation of Neighbourhood Plans where applicable, and through the determination of applications for planning permission.

Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need. The proposed distribution is for 1,180 homes across 2 sites in North Oxford; 330 homes across 2 sites south of Kidlington; 2,390 across Begbroke and Yarnton and 500 south east of Woodstock. The Planning Inspector issued a preliminary advice note in July 2019, proposing modifications to the Plan, including the deletion of the Woodstock allocation. The current pupil forecasts include only the housing numbers in the adopted Local Plan, and permitted sites. The additional housing proposed in the Partial Review would generate significantly more pupils. The recent expansion of Edward Feild Primary School is expected to ensure that sufficient school places will be available for the Kidlington housing allocation. The Partial Review includes policies requiring a new primary school north of Oxford; up to two new primary schools in Begbroke; a new primary school in Woodstock; land for the expansion of William Fletcher Primary School in Yarnton; and a new secondary school at Begbroke. However, the exact school solution in each case will be confirmed at the time when planning applications are submitted, informed by the latest data, and may include expansions at one or more other schools as well as, or instead of, new schools.

Oxford City

NEW PLANNING SUB-AREAS: PA1 - Oxford North; PA2 - Oxford East; PA3 - Oxford Central; PA4 - Oxford South

Primary schools	School partnership - see secondary [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bayards Hill Primary School	Headington [PA2]	2015	ACA	60	60	41	420	353	60	39	50	Part of the Community Schools Alliance Trust. Shares accommodation with Oxfordshire County Music Service.
Church Cowley St James CE Primary School	Isis [PA4]	3210	VC	100	60	59	420	410	60	74	60	New larger nursery building completed 2019.
Cotteslowe Primary School	Cherwell PA1]	2004	ACA	142	60	38	420	315	60	53	54	Expanded from 1 form entry; pupil numbers rising rapidly. Part of River Learning Trust.
East Oxford Primary School	Isis [PA3]	2525	COM	52	45	45	315	281	45	34	37	Admission number increased from 40 to 45.
John Henry Newman Academy	Oxford SE [PA4]	2000	ACA	64	60	40	420	290	60	42	49	Part of Oxford Diocesan Schools Trust (ODST).
Larkrise Primary School	Isis [PA3]	2027	ACA	52	60	53	420	394	60	47	47	Converted to academy in February 2019 as part of the River Learning Trust.
New Hinksey CE Primary School	Cherwell [PA3]	3213	VC	20	28	24	175	151	28	18	19	Increased admission number to 28 for 2017 onwards, but school site too small for further expansion.
New Marston Primary School	Cherwell [PA2]	2020	ACA	52	60	43	420	324	60	25	27	Converted to academy as part of River Learning Trust. Includes special resource unit for hearing impaired pupils.
Orchard Meadow Primary School	Oxford SE [PA4]	2006	ACA	52	60	40	420	325	60	23	24	Part of United Learning Trust. Expanded to 2 form entry. Shares a site and Nursery with Mabel Prichard (special) School.
Our Lady's (VA) Catholic Primary School	Isis [PA3]	3836	ACA	52	45	40	315	280	45	34	38	Part of Dominic Barberi MAT. Extended age range to include nursery from Sept 19.

Oxford City

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Pegasus Primary School	Oxford SE [PA4]	2593	ACA	78	60	60	420	421	60	53	55	Part of United Learning Trust. Shares site with Two by Two (governor-run provision targeted at funded 2 year old children).
Rose Hill Primary School	Oxford SE [PA4]	2023	ACA	78	60	25	420	283	60	27	26	Converted to academy in September 2018 as part of the River Learning Trust.
St Aloysius (VA) Catholic Primary School	Cherwell [PA1]	3842	VA	52	30	22	210	192	30	29	30	Nursery class opened January 2017, using the accommodation vacated by previous bulge class (this cohort now transferred to secondary school).
St Andrew's CE Primary School	Headington [PA2]	3211	VC	0	30	31	240	245	30	44	30	School admitted a "bulge" class in 2010 and then again in 2017; in other years admission number is 30. Reception children class taught in the Quarry Nursery School building.
St Barnabas CE (VA) Primary School	Cherwell [PA1]	3832	VA	24	30	26	210	188	30	26	28	Constrained site would be an obstacle to expansion.
St Christopher's CE Primary School	Isis [PA3]	2010	ACA	66	60	48	420	383	60	34	41	Part of the Oxford Diocesan School Trust (ODST).
St Ebbe's CE (VA) Primary School	Cherwell [PA3]	3833	VA	0	60	53	419	358	60	59	59	
St Francis CE Primary School	Isis [PA3]	3253	VC	52	40	36	280	256	40	25	27	Potential for permanent expansion to PAN 45 explored but expansion not currently viable due to high cost of identified accommodation solution.

Oxford City

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
St Gregory the Great Catholic School	Isis [PA3]	4145	ACA	52	60	35	420	274	60	33	34	Part of Dominic Barberi MAT. Primary phase of this all-age school opened in 2013 - pupil numbers still rising. The Pod provides 'governors powers' places for funded 2 year old children and other childcare services for children in the early years age group.
St John Fisher (VA) Catholic Primary School	Oxford SE [PA4]	3839	ACA	52	30	30	210	202	30	32	30	Part of Dominic Barberi MAT.
St Joseph's (VA) Catholic Primary School	Cherwell [PA2]	3838	VA	0	60	59	420	416	60	46	60	
St Mary & John CE (VA) Primary School	Isis [PA3]	3834	VA	0	60	59	420	410	60	68	60	Reception children based at Comper Foundation Stage School.
St Michael's CE (VA) Primary School	Cherwell [PA2]	3216	VA	0	30	30	210	195	30	29	28	School site too small for expansion. Shares site with New Marston Pre-school.
St Nicholas' Primary School	Cherwell [PA2]	2352	COM	60	60	51	420	403	60	44	45	Includes 13-place special resource unit for speech, language and communication and autistic spectrum disorder.
St Philip & St James' CE (VA) Primary School	Cherwell [PA1]	3835	VA	0	60	57	420	411	60	68	60	
Tyndale Community School	Isis [PA3]	2008	ACA	0	60	59	420	324	60	46	53	Opened 2013 as a promoter-led Free School. Apparent spare capacity relates to year groups not yet operating. Part of Chapel Street Schools.
Windale Primary School	Oxford SE [PA4]	2005	ACA	78	30	27	420	243	30	29	29	Admission number for reduced from 60 in 2018. Part of United Learning Trust. Shares site with Two by Two provision, Governor-run for funded 2 year old children.

Oxford City

Primary schools (cont)	Location [Planning sub-area]	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Windmill Primary School	Headington [PA2]	2527	COM	0	90	88	630	627	90	133	90	
Wolvercote Primary School	Cherwell [PA1]	2534	ACA	39	45	45	315	280	45	40	40	Expanded to 1.5 form entry and apparent spare capacity relates to pre-expansion year groups. Potential to expand to 2 form entry has been explored and may require a split site. Converted to academy as part of River Learning Trust.
Wood Farm Primary School	Headington [PA2]	2589	COM	0	60	60	420	418	60	45	54	Federated and co-located with Slade & Headington Nursery School.
Total for partnership				2083	1553	1324	11089	9652	1553	1299	1284	
% spare places						15%		13%		16%	17%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Cheney School	Headington	4120	ACA	11-18	270	267	1738	1483	270	286	270	Admission number increased to 270 for 2016 onwards, following a significant capital programme combining housing developer contributions and DfE funding. Part of Community Schools Alliance Trust.
Oxford Academy	Oxford South East	6906	ACA	11-19	210	210	1322	997	210	227	210	Pupil numbers rising rapidly. Independent nursery on the school site opened October 2018. Shares a site with the secondary phase of Mabel Pritchard (special) School.

Oxford City

Secondary schools (cont)	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Oxford Spires Academy	Isis	6907	ACA	11-19	220	221	1350	1198	220	255	220	Pupil numbers rising rapidly. Sponsored by Anthem (formerly known as CfBT). Admission number increased from 210 to 220 for 2016 onwards.
St Gregory the Great Catholic School	Isis	4145	ACA	4-19	210	83	1275	830	210	34	183	As a Catholic school, draws from a wide area. In Sept 2013 became an all-age school, admitting Reception and nursery pupils for the first time. Part of Dominic Barberi MAT.
The Cherwell School	Cherwell	4116	ACA	11-18	270	284	1850	1996	270	463	285	Admitted over its admission number in 2017-2019 due to pressure on places ahead of the new Swan School opening. Part of the River Learning Trust. Includes 20-place special resource unit for speech, language and communication and autistic spectrum disorder pupils.
The Swan School	Cherwell	4016	ACA	11-18	n/a	n/a	n/a	n/a	120	n/a	115	Opened September 2019 as a free school as part of the River Learning Trust, initially in temporary accommodation. Will have admission number of 120 in 2019 and 2020, then rising to 180. Eventual capacity will be 1260. First preference data not available due to separate applications process this year.
Total for partnership					1180	1065	7535	6504	1300	1265	1283	
% spare places						10%		14%		3%	1%	

Oxford City

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts (More detailed forecasts are included at the end of this Plan.)
Reception	1283	1339	1261	1245	1279	<p>After the peak Reception intake of 2015, demand for Reception places has subsided further than previous forecast, and future projections have been revised accordingly. Overall spare places disguises pockets of pressure, and an emerging need for school places related to large scale housing developments towards the north and east of the city. (Primary pupil forecasts for sub-areas of Bicester are available in the annex to this Plan.)</p> <p>The rapid growth in pupil numbers experienced by primary schools over recent years is now starting to feed into secondary schools, where significant additional capacity is now required.</p>
All primary	9674	9784	9734	9551	9453	
Year 7	1255	1191	1273	1312	1293	
All secondary	6769	7016	7299	7619	7904	

Comments on school capacity

The rapid growth in demand for primary school places in recent years required many schools to expand, and there are now few opportunities for further expansion. Instead, the main increase in primary school capacity during this Plan period will be through the opening of a new school in Barton, the Barton Park Primary School expected for 2020. This will be 1.5 form entry, but have the potential to expand to 2 form entry. The school will be run by the Community Schools Alliance Trust. Otherwise, the county council does not currently foresee a need for further new schools within Oxford, although if large-scale developments adjoining Oxford are approved, these may require new schools. In addition, large-scale locally concentrated housing growth such as at Oxford North (previously referred to as Northern Gateway) would be expected to require school expansion unless new schools are included, and a feasibility study into expanding Wolvercote Primary School has been undertaken.

As the population growth has moved into secondary school age, there would have been a severe shortage of secondary school places in 2019 without the opening of the new Swan School, as part of the River Learning Trust. Its permanent home will be in Marston (sharing a site with the Meadowbrook College), but initially it is operating in temporary accommodation on the Cherwell School site. This will provide an additional 180 places per year which is expected to be broadly sufficient for the currently planned scale of housing growth within Oxford. Proposals for significant housing development on the outskirts of Oxford, still to be confirmed, would be expected to require another new secondary school to serve the city and its surrounding area.

Nursery Schools

There are 4 community Nursery Schools run by the county council in Oxford:

- Comper Foundation Stage School offers 78 part time equivalent places for pupils aged 3 to 5.
- Grandpont Nursery School offers 140 part time equivalent places for pupils aged 3 to 5.
- Slade Nursery School offers 156 part time equivalent places for pupils aged 2 to 5. Slade Nursery is Federated with Wood Farm School.
- Headington Quarry Foundation Stage School offers 100 part time equivalent places for pupils aged 3 to 5.

Early Years Free Entitlement

Early years provision across this area currently just about meets the need of the local population. Additional capacity will be required in response to population growth from planned housing developments.

Oxford City

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites **NB As much of the planned housing exceeds the time period of this plan, housing numbers are shown in the format [Overall Housing; of which completions during this pupil place plan period]**
Barton	42	96	100	108	100	100	100	140	146	932	Barton Park [885]; Maltfield Road [47].
Blackbird Leys	0	0	0	0	0	0	0	80	0	80	Knights Road [80].
Churchill	0	0	10	0	100	75	36	0	0	221	Churchill Hospital [136]; Warneford Hospital [75]; Valentia Road [12]; Warren Crescent [10].
Cowley	0	0	38	70	79	50	117	67	0	421	Templars Square [225]; Iffley Mead [84]; Barns Road East [25]; Murco Garage [28]; Meadow Lane [49].
Cowley Marsh	0	0	24	24	0	0	25	110	113	296	Cowley Marsh Depot [80]; Jesus College [28]; Lincoln College [90]; Temple Cowley Pool [48]; Slade House [50].
Greater Leys	0	0	0	0	0	30	30	70	70	200	Blackbird Leys Central [300; 200 in plan period].
Headington	37	0	0	110	80	0	65	50	50	392	John Radcliffe Hospital [150]; London Rd [37]; Pullens Lane [15]; Marston Road [70]; OBU Student Village [120].
Hinksey Park	0	0	0	0	0	0	0	0	0	0	
Iffley Fields	0	22	12	0	0	0	0	0	0	34	Iffley Rd [34].
Littlemore	0	0	50	50	160	100	200	0	54	614	Kassam Stadium [150]; Sandford Rd [140]; Armstrong Rd [270]; Sandy Lane West [25]; Oxford Academy [69; 29 in plan period].
Marston	0	8	8	0	39	0	0	29	29	113	Marston Paddock [39]; Park Farm [58]; Jack Russell Pub [16].
North Ward	59	0	70	70	50	50	50	50	78	477	Oxpens [445]; Westgate Centre [59]; Manor Place [40]; Green Templeton College [28].
Osney	12	13	0	16	80	50	50	72	50	343	Osney Mead [280]; Canalside Jericho [22]; Abbey Rd [12]; Old Power Station [16]; Sommerville College [13].

Oxford City

Area (based on MSOA) - number of dwellings (cont)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites <i>**NB As much of the planned housing exceeds the time period of this plan, housing numbers are shown in the format [Overall Housing; of which completions during this pupil place plan period]**</i>
Risinghurst	0	0	0	100	0	0	80	50	0	230	Bayards Hill Playing Field [30]; Nielsen House [200].
St Margaret's	0	0	0	0	0	35	35	30	30	130	Ewert House [130].
St Mary's	0	24	0	0	0	0	0	0	20	44	Chapel St [24]; Magdalen Road [20].
Summertown	0	0	20	0	0	0	0	35	10	65	276 Banbury Rd [35]; Summertown House [386; 10 in plan period]; Millway Close [20].
Wolvercote	0	0	50	156	140	150	150	150	28	824	Northern Gateway [480]; Paper Mill [190]; St Frideswide Farm [128]; Elsfield Hall [26].
Total	2167	2181	2401	2724	2849	2662	2961	2957	2703	5416	

Oxford's Core Strategy for Growth to 2026 was approved by the Secretary of State in autumn 2010, and sets out the intention to provide at least 8,000 additional dwellings in Oxford city between 2006 and 2026. Of these, approximately half had been built by 2018. Over the last 5 years, the building rate has been just over 300 dwellings per year. Examination is underway into a new Local Plan 2016-2036 which will replace the Core Strategy. The Plan proposes at least 8,620 new homes to be built in Oxford over the plan period 2016-2036. This equates to a delivery of 431 dwellings per annum, faster than the Core Strategy and recent delivery rates. This delivery target is based on the council's assessment of the city's capacity to accommodate additional housing, and would not fully meet the objectively addressed need for Oxford, currently estimated as requiring around 1,400 homes per year. The need for, and capacity to deliver, housing within the city will be matters addressed in the Plan's examination. The City Council is working in partnership with the other Oxfordshire authorities through the Oxfordshire Growth Board to address its unmet housing needs, which will require significant additional housing growth in the surrounding districts.

Sonning Common

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Kidmore End CE (VA) Primary School	Kidmore End	3807	ACA	0	30	27	210	200	30	20	20	Part of the Oxford Diocesan Schools Trust (ODST).
Peppard CE Primary School	Peppard	3205	VC	0	15	14	105	98	15	13	14	Governors have secured a site for the potential relocation of the school subject to capital funding becoming available.
Sonning Common School	Sonning Common	2506	COM	0	60	46	409	381	60	37	39	In practice the current layout and suitability of accommodation at the school restricts its ability to provide the required curriculum spaces for a 2 form entry school. The school and county council have explored options to supplement their accommodation, subject to funding becoming available. Shares site with the primary phase of Bishopswood (Special) School and Sonning Common Library. Sonning Common Pre-school is located adjacent to the school site.
Total for partnership				0	105	87	724	679	105	70	73	
% spare places						17%		6%		33%	30%	

Sonning Common

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Maiden Erlegh Chiltern Edge School	Sonning Common	4013	ACA	11-16	120	69	980	361	120	61	99	Pupil numbers fell suddenly after the school became subject to special measures following an Ofsted inspection that took place in March 2017. It has since converted to an academy as part of the Maiden Erlegh Trust. School previously had an admission number of 180. Also serves Caversham (Reading), and demand for places is strongly dependent on Reading. Co-located with the secondary school age range of Bishopswood (Special) School and the Youth Centre - opportunities are being explored to improve the accommodation provision for Bishopswood. School has been granted DfE permission to sell part of their site, including the area previously occupied by Kingfisher Kindergarten.
% spare places						43%		63%		49%	18%	

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Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on growth
Reception	73	75	78	80	79	There is a significant flow of pupils from Reading to schools in this area, which makes pupil numbers more difficult to forecast. Pupil forecasts shown assume this flow is constant, but this will depend on the balance of supply and demand for places within Reading. Reading's demand for secondary school places is forecast to grow rapidly over the next few years, and Reading Borough Council expects this to increase the flow of pupils to Maiden Erlegh Chiltern Edge School. However, in the longer term a new secondary school is due to open in Reading, which will counter the increase in population.
All primary	668	646	622	597	576	
Year 7	99	90	100	99	96	
All secondary	384	426	447	459	486	

Sonning Common

Comments on school capacity

Schools in this area are affected by demand from families living on the outskirts of Reading. Maiden Erlegh Chiltern Edge in particular plays a key role in providing secondary school places for families living within the Caversham and Emmer Green area in Berkshire, and since September 2012 the area of Reading which is north of the River Thames (Caversham) has been in the designated area of Maiden Erlegh Chiltern Edge School. In recent years several new primary and secondary schools have opened in Reading, with more planned, and the balance between the additional capacity provided these and Reading's population growth will affect demand for places in Sonning Common schools. Additional school capacity is not currently expected to be required within this area.

Early Years Free Entitlement

There are sufficient early years places to meet the needs of the local population.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Shiplake	0	60	60	70	27	27	14	0	0	258	Highlands Farm, Rotherfield Greys [163]; Thames Farm, Shiplake [95].
Sonning Common	30	35	0	27	98	10	0	0	0	200	Memorial Hall Field [50]; Kennylands Road [26]; Kennylands Paddock [22], Lea Meadow [65]; Chiltern Edge [37].
Total	30	95	60	97	125	37	14	0	0	458	

Sonning Common

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 12 larger villages, including Sonning Common. In many cases the village housing sites will be identified through a Neighbourhood Plan process. The housing allocated through the Sonning Common Neighbourhood Plan is included in the forecasts above.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 807 homes from the revised neighbourhood plans at Henley-on-Thames, Thame, Sonning Common, and Woodcote, and 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Thame

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Aston Rowant CE Primary School	Aston Rowant	3180	VC	0	15	8	105	60	15	10	10	Capacity is significantly dependent on temporary classrooms.
Barley Hill Primary School	Thame	2463	COM	0	90	72	630	481	90	56	69	School has increased admission number to 90 from Sept 2017, increasing capacity to 630, ahead of local housing growth. Shares a site with privately-owned Busy Bees Playgroup.
John Hampden Primary School	Thame	2591	COM	52	60	60	418	405	60	82	60	Expanded from 1.5 to 2 form entry in response to housing development within the town. Federated with Tetsworth Primary School.
Mill Lane Community Primary School	Chinnor	2465	COM	52	30	27	210	189	30	34	30	Jack and Jill Pre-school (Chinnor) located on adjacent site. Capacity includes temporary accommodation, which the school is working towards replacing. Given the scale of housing growth planned in Chinnor, this school may need to expand in due course.
St Andrew's CE Primary School	Chinnor	3182	VC	0	45	46	315	326	60	38	41	School is expanding to 2 form entry from 2019 to meet the needs of housing growth. Includes a resource unit for speech, language & communication and autistic spectrum disorder special needs. Ladybird Pre-school occupies space within the school.
St Joseph's (VA) Catholic Primary School	Thame	3826	ACA	0	30	28	210	197	30	19	27	Part of Dominic Barberi MAT.

Thame

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Tetsworth Primary School	Tetsworth	2456	COM	15	8	12	56	60	8	7	7	School has very constrained site and accommodation. The county council is working with Governors to plan a project related to a neighbouring housing development to provide additional school accommodation which would allow admission number to increase to 10, in line with forecast demand, but further expansion is not considered possible. Federated with John Hampden Primary School.
Total for partnership				119	278	253	1944	1718	293	246	244	
% spare places						9%		12%		16%	17%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Lord Williams's School	Thame	4580	ACA	11-18	320	329	2197	2119	320	329	320	Admitted a "bulge" class in 2017 due to an atypically large transfer cohort. Designated area extends into Buckinghamshire. Split site school. Academy developing a proposal to expand to 12 forms of entry. Include 30-place resource unit for speech, language & communication and autistic spectrum disorder special needs (in an additional temporary classroom). Shares site with Lord Williams's School Day Nursery. Part of the Thame Partnership MAT.
% spare places						-3%		4%		-3%	0%	

Thame

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	258	227	263	244	245	<p>Primary school intakes in this area have not shown a consistent pattern of growth, and the fluctuating demand is forecast to continue, although with some overall increase. Pupil numbers are most likely to grow at schools with significant housing growth in their catchments.</p> <p>Lord Williams's designated area includes Chinnor, which is also in the designated area of Icknield Community College, Watlington; the significant recent proposed/permitted housing in Chinnor could affect either school. Lord Williams's also attracts pupils from areas of Buckinghamshire outside its catchment. It is forecast to have sufficient places for in-catchment children throughout the current Plan period. However, as local population grows, there will be a reduction in the number of non-catchment pupils who are able to secure a place at the school. This could increase pressure on surrounding schools, including those in Buckinghamshire.</p>
All primary	1725	1725	1741	1707	1707	
Year 7	320	309	336	372	323	
All secondary	2149	2142	2169	2219	2207	

Comments on school capacity

Several primary schools in this area have expanded in response to recent and planned housing development, in some cases providing additional school capacity faster than the pupil generation from the housing growth, so in the short term creating spare places. However, overall spare places often disguises shortages in particular year groups, especially for children moving into the area after school places have been allocated. Once the current expansion programme is completed, there is expected to be sufficient capacity to meet demand resulting from the adopted SODC Core Strategy, but if housing growth increases significantly more than currently planned, it could trigger the need for further expansion within Thame. The Thame Neighbourhood Plan protects a site for a potential new primary school, as well as for secondary school expansion.

The Lord Williams's designated area includes some Buckinghamshire villages. It also attracts children from outside its designated area, especially from Buckinghamshire. As future housing development in Thame increases the local population, the planned expansion of Lord Williams's should ensure sufficient school choice for families within the catchment area, but there is likely to be a reduction in choice for families outside the catchment area. Chinnor also lies in the designated area for Icknield Community College in Watlington.

Early Years Free Entitlement

The early years provision across this area barely meets the needs of the local population. Additional capacity will be required to meet increase demand for places created by housing developments.

Thame

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Chinnor, Tetsworth	68	91	238	96	27	8	0	0	0	528	Chinnor: Siareys Yard [22]; Crowell Road [120]; Kiln Lane [21]; Greenwood Avenue [80]; Lower Icknield Way [89]; Mill Lane [78]; Thame Lane [61]; Oakley Road [14]; Thame Road [39; 4 in plan period]. Tetsworth: Mount Hill Farm [39].
Thame North	0	0	0	0	13	16	0	0	0	29	Wellington Street [29].
Thame South	222	116	112	76	69	60	15	0	0	670	The Elms [37]; W of Thame Park Road [175]; S of Wenman Road [108]; Park Street [20]; Howland Road [45]; Lord Williams's School [135]; North of Oxford Road, Thame [203, 160 in Plan period].
Total	290	207	350	172	109	84	15	0	0	1227	

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 12 larger villages, including Chinnor.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 807 homes from the revised neighbourhood plans at Henley-on-Thames, Thame, Sonning Common, and Woodcote, and 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Wallingford

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Benson CE Primary School	Benson	3181	VC	26	30	29	210	198	45	51	45	School is expanding to 1.5 form entry (315 places) from 2019, with the current site area being supplemented by a detached playing field within a nearby proposed housing development. Longer term expansion to 2 form entry may be required due to the scale of housing growth now proposed, but will only be confirmed if forecast pupil numbers show a school of this size will be financially sustainable.
Brightwell-cum-Sotwell CE Primary School	Brightwell-cum-Sotwell	3221	ACA	0	20	18	140	105	30	24	25	Potential to expand school on current site if local housing demands it. Allsorts Pre-school co-located within school site and buildings. Part of the Merchant Taylors Oxfordshire Academy Trust Ltd.
Cholsey Primary School	Cholsey	2596	ACA	0	60	54	330	297	60	42	42	Previously expanded to 1.5 form entry in response to housing development, but school remained over-subscribed from within catchment, and further expansion to 2 form entry now underway. Cholsey Pre-school occupy space within the school and will also expand. Part of the Oxford Primaries Education Network (OPEN) Umbrella Trust.
Crowmarsh Gifford CE School	Crowmarsh Gifford	3200	VC	0	30	26	210	196	30	30	30	Feasibility of expansion has been assessed, but additional site area would be required to meet recommended standards. This school's future size needs to be planned within the context of growth in Wallingford. Crowmarsh Pre-school on site.

Wallingford

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Fir Tree Junior School	Wallingford	2578	ACA	0	60 for Year 3	45 for Year 3	240	212	60 for Year 3	56 for Year 3	56 for Year 3	Recently expanded from 1.5 form entry to 2 form entry. Longer term proposal to become a primary school, linked to relocation of St Nicholas Infant School (see below). Part of Oxford Diocesan Schools Trust (ODST).
St John's Primary School	Wallingford	2567	ACA	0	30	28	210	201	30	37	30	This school is unable to grow on its current restricted site. Detached playing field, which also houses Paddocks Pre-school. Part of the Oxford Primary Education Network (OPEN) Umbrella Trust.
St Laurence CE (VA) Primary School	Warborough	3760	VA	0	15	15	105	94	15	19	15	Shares site with Warborough & Shillingford Pre-school.
St Nicholas CE Infants' School & Foundation Stage	Wallingford	3244	ACA	21	60	54	180	171	60	54	55	The school is currently on a restricted site, but is proposed to relocate and become a primary school within the strategic housing development at Slade End. In the interim, temporary accommodation has been installed to allow the school to increase its admission. Operating a smaller nursery at present (down from 48 places) in temporary accommodation. Part of the Oxford Diocesan Schools Trust.
Total for partnership				47	245	224	1625	1474	270	257	242	
% spare places						9%		9%		5%	10%	

Wallingford

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Wallingford School	Wallingford	4140	ACA	11-18	190	194	1220	1241	216	261	216	Admission number increased by one form of entry in 2019, which will be accommodated with a temporary classroom ahead of permanent building work completing, after which the school's admission number will increase again to 242, and total capacity to c1,500. Tiny Toes Pre school on site.
% spare places						-2%	-2%	-21%	0%			

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	245	243	217	248	252	Demand for Reception places is growing faster than previously forecast. Aside from a forecast dip in 2021, in the longer term demand will continue to rise due to recent and proposed housing developments, with significant increases from 2022 onwards. Wallingford School's expansion is planned to ensure its admission number increases in line with catchment demand. Forecasts do not include the increased housing allocations proposed in the SODC Local Plan 2033. The housing developments which are included will not have had their full impact during the time period shown.
All primary	1529	1595	1614	1659	1678	
Year 7	219	203	217	223	227	
All secondary	1253	1280	1311	1343	1374	

Comments on school capacity

Primary pupil numbers in this area have risen, necessitating temporary accommodation as well as permanent expansion at some schools. Recent and proposed housing developments will continue to put pressure on school places. Even where there are overall spare places, this often disguises shortages in particular year groups, especially for children moving into the area after school places have been allocated. The expansions underway of Cholsey Primary School and Benson Primary School will increase combined primary admission numbers to 260. The planned relocation of St Nicholas CE Infant School will enable both this and Fir Tree Junior School to become primary schools, which will facilitate expansion of capacity within Wallingford by up to 2 forms of entry; this expansion will be phased to stay in line with population growth.

Wallingford School is also expanding to meet demand from the rising pupil numbers already in primary school as well as from future housing growth, and is committed to meeting the needs of its catchment area. Demand for places at the school will also be affected by potential changes to secondary school provision in neighbouring areas, including Watlington and Didcot. For example, the planned new secondary school in NE Didcot will be closer than Wallingford to some villages which currently feed to Wallingford School.

Wallingford

Early Years Free Entitlement

The early years provision across this area currently meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Chalgrove	0	14	96	81	74	60	60	50	0	435	E of Chalgrove [120]; Newington Road, Stadhampton [65]; Newington Nurseries, Stadhampton [21], W of Marley Lane, Chalgrove [200]; Six Acres, Warborough [29].
Cholsey	0	27	27	96	67	13	0	0	0	230	East End Farm, Cholsey [67]; Celsea Place, Cholsey [60]; Cholsey Meadows [14]; N of Charles Road, Cholsey [15]; Main Road, E Hagbourne [74].
Crowmarsh and Benson	38	60	60	174	234	321	192	116	60	1255	Mongewell Park, Mongewell [166]; Nosworthy Way, Mongewell [91]; N of Littleworth Road, Benson [187+241]; Benson NDP Site 2 [80]; Benson NDP Site 3/4 [241]; E of Benson Lane, Crowmarsh Gifford [150], S of Newnham Manor, Crowmarsh Gifford [100].
Wallingford	67	27	96	152	185	165	165	165	117	1139	W of Reading Road [84]; St Martins Street [22]; Hithercroft Industrial Estate [94; 60 in plan period]; W of Wallingford [555; 420 in plan period], Little Martins Field, Brightwell-cum-Sotwell [31]; Brightwell-cum-Sotwell NDP Site 2 [20]; N of Wallingford Bypass [502].
Total	105	128	279	503	560	559	417	331	177	3059	

Wallingford

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 12 larger villages, including Benson, Cholsey and Crowmarsh Gifford. The housing allocated through the Benson Neighbourhood Plan is included in the forecasts above.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Wantage

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Charlton Primary School	Wantage	2573	ACA	0	60	60	420	417	60	66	60	Pupil numbers have risen rapidly since expansion. Part of Vale Academy Trust. Charlton Acorns pre-school on the school site.
Grove CE School	Grove	3228	ACA	0	30	13	210	149	30	14	18	School has increased admission number from 15, so far accommodated with temporary buildings. Feasibility study underway into expansion to 2 form entry to accommodate local housing growth including at Monk's Farm. Part of the Oxford Diocesan Schools Trust (ODST).
Millbrook Primary School	Grove	2016	ACA	52	60	57	420	371	60	49	57	Part of Vale Academy Trust. Grovelands Park Pre-School adjacent. Substantive nursery PAN is 78 pte.
St Amand's (VA) Catholic Primary School	East Hendred	3855	VA	0	28	9	150	139	28	9	11	Pupil numbers have risen rapidly, but intakes fluctuate significantly. School's current admission number is higher than that supported by its accommodation.
St James CE Primary School	Hanney	3225	ACA	0	30	22	210	141	30	27	28	Pupil numbers growing rapidly since expansion to 1 form entry (admission number 30; capacity 210) to meet local population growth. Hanney Pre-school Playgroup is on the school site. Part of Vale Academy Trust.
St Nicholas CE Primary School	East Challow	3224	ACA	0	15	16	105	83	15	10	12	Part of Vale Academy Trust.
Stanford-in-the-Vale CE Primary School	Stanford-in-the-Vale	3240	VC	0	30	30	210	203	30	36	30	Options for expanding the school to 1.5 form entry on its current site continue to be developed. The school is currently making use of the adjoining Millennium Green to supplement their constrained site.

Wantage

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Stockham Primary School	Wantage	2583	COM	0	30	31	210	212	30	49	30	Initial feasibility work into potential to expand confirmed that additional site area would be required. Suitable land has been identified, but is not currently available to enable the school to expand. Camel Pre-school is currently located on the school site.
The Hendreds CE (VA) Primary School	West Hendred	3250	ACA	0	18	20	150	143	18	17	18	Part of the Oxford Diocesan Schools Trust (ODST).
The Ridgeway CE Primary School	Childrey	3231	VC	0	14	15	105	79	14	16	14	Following internal building works, from 2018 the school has been able to increase its admission number from 10 to 14, and its capacity from 70 to 105. Apparent spare capacity relates to pre-expansion year groups.
Uffington CE Primary School	Uffington	3251	VC	15	15	17	105	103	15	11	12	School has a constrained site. An initial options appraisal has identified potential to expand to an admission number of 20, if local population growth makes this necessary.
Wantage CE Primary School	Wantage	3246	ACA	60	60	60	420	395	60	48	58	Part of Vale Academy Trust.
Total for partnership				127	390	350	2715	2435	390	352	348	
% spare places						10%		10%		10%	11%	

Wantage

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
King Alfred's (A Specialist Sports College)	Wantage	4142	ACA	11-18	390	248	2205	1679	390	223	264	Part of Vale Academy Trust. King Alfred's has consolidated from 3 to 2 sites, disposing of East site. Buildings development programme allows school to increase intake from 310 to 390 until planned new Grove Airfield School opens (expected 2023), after which admission number will fall again.
% spare places						36%		24%		43%	32%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	354	394	401	406	446	<p>Significant housing growth in this area extends beyond the period covered by this Pupil Plan, and will further increase pupil numbers. Most of the impact from housing growth on demand for secondary school places, in particular, will be beyond the time period of this Plan. Forecasts do not include additional housing growth proposed in the Local Plan Part 2, except where that relates to an already permitted site.</p> <p>Primary school capacity has been under pressure in this area for several years, and demand is forecast to continue to rise due to recent and proposed housing developments, creating a shortage of places in the area from 2020 onwards which will require a combination of new schools and further expansions.</p> <p>The opening of a new secondary school in Didcot has changed the pattern of pupil movement, as King Alfred's previously attracted some pupils from the Didcot area. However, due to housing growth in the area, forecasts show that rapid increases in demand for secondary places are expected.</p>
All primary	2517	2655	2749	2767	2875	
Year 7	266	256	310	365	316	
All secondary	1658	1629	1661	1767	1809	

Wantage

Comments on school capacity

The latest forecasts suggest that there will be insufficient primary school places in the area by 2020. There are also pockets of shortages in locations where there is significant housing growth. This will result in a need for new/expanded schools, the first of which due to open is in NE Wantage within the Kingsgrove development, with a planned opening date of 2020. The GEMS Learning Trust has been approved as sponsor for this school. Grove CE Primary School is proposed to expand to 2 form entry, subject to the progress of the Monk's Farm development, which is providing additional site area for the school. A new all-through primary and secondary school on Grove Airfield has been provisionally approved by the DfE, currently expected to open in 2023. In the longer term, another new primary school is expected on Grove Airfield. Investigations are ongoing into how best to expand Stanford-in-the-Vale Primary School. The potential to expand Stockham Primary School has also been explored, but cannot be progressed unless additional land is made available. Expansion of other village primary schools may also become necessary, related to local housing growth.

Ahead of the planned new school for Grove Airfield, King Alfred's Academy has increased its admission number from 310 on a temporary basis to meet the needs of the already growing local population. Once the new school opens, King Alfred's will revert to its long term admission number, which is broadly in line with the level of demand which would have been required in the absence of housing growth. The academy's ambitious capital investment programme, through which it has reduced from 3 sites to 2, is based on the academy's long term capacity, while in the meantime facilitating the temporary expansion.

The additional permanent secondary capacity to meet the needs of housing growth will be provided through the new school on Grove Airfield. Vale Academy Trust has been granted provisional approval to open this as an all-through primary and secondary school, providing 2 forms of entry in primary provision and 4 forms of entry in secondary provision (11-16 age range). The current ambition is to open this for September 2023. Additional sixth form places will be provided at King Alfred's. Given the scale of development now proposed for this area, the secondary provision of the Grove Airfield school is expected to need to grow in due course.

Early Years Free Entitlement

The early years provision across this area barely meets the needs of the local population. Additional capacity will be required to meet increase demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Drayton, Steventon, Sutton Courtenay, Milton	156	152	182	171	128	60	110	110	110	1179	See Didcot/Abingdon sections for housing in Drayton/Steventon/Multon/Sutton Courtenay.
Faringdon, Stanford-in-the-Vale	75	175	251	277	210	90	40	40	40	1198	Stanford in the Vale: W of Stanford in the Vale [22]; Penstones Farm [18]; Bow Farm [2 sites; 20+19]; W of Faringdon Road [100]; N of Ware Road [78], plus Faringdon and Great Coxwell housing (see Faringdon section).
Grove	90	80	325	306	270	270	270	235	236	2082	Monk's Farm strategic allocation, 2 sites [650; 536 in plan period]; Bellinger's Garage, Grove [75]; Grove Airfield [2500; 1298 in plan period]; The Bungalow [13]; W of Station Road [160].
Harwell, Hendreds	138	91	106	88	69	1	0	0	0	493	Harwell: Reading Road [16]; Didcot Road [19]; S of Blenheim Hill [80; 60 in plan period]; N of Grove Road [207]. East Hendred: N of Portway Villas [26; 12 in plan period]; E of Portway Cottages [46]; Mather House & Greensands [75]; plus other Didcot housing - see Didcot section.

Wantage

Area (based on MSOA) - number of dwellings (cont)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
South West Vale, Shriveham, Watchfield	125	120	228	198	105	100	100	55	0	1031	Challow Park, East Challow [38]; Park Farm, East Challow [88]; plus other housing in Faringdon/Watchfield/Shriveham - see Faringdon section.
Southmoor	139	128	133	103	61	50	20	0	0	634	School Road, West Hanney [15], East Hanney: Steventon Road, East Hanney [39], Steventon Road Nurseries, East Hanney [40]; N of Summertown, East Hanney [55], plus other housing in Kingston Bagpuize/Southmoor - see Faringdon section.
Wantage	144	122	173	204	250	230	150	100	150	1523	Stockham Farmhouse [90]; Church Street [2 sites = 32+10]; Wallingford Street [24]; S of Challow Road [29]; Limborough Road [14]; Stockham Farm [2 sites = 200+90; 60 in plan period]; King Alfred School [150]; Crab Hill [1500; 1100 in plan period].
Total	867	868	1398	1347	1093	801	690	540	536	8140	

The Vale of White Horse (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for 'at least' 20,560 homes, including: Abingdon (1150); Kennington (270); Radley (240); Sutton Courtenay (220); Kingston Bagpuize (280); Didcot Valley Park (2,550); NW of Valley Park (800); Milton Heights (400); Harwell (200); Crab Hill Wantage (1500); Monks Farm Grove (885); Stanford in the Vale (200); Faringdon & Coxwell (950); and Shriveham (500). In addition, 2,500 homes at Grove Airfield were carried forward from the 2011 Local Plan.

On 9 October 2019, the council voted to adopt their Local Plan Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to include 2,200 as its contribution towards addressing Oxford's Unmet Need. Of these, by March 2018 6,300 had been completed and 13,387 more were already permitted. In addition to the Local Plan Part 1 allocations, the Part 2 Plan adds allocations of 130 homes in East Hanney (2 sites); a further 600 in Kingston Bagpuize with Southmoor, 90 to the south-east of Marcham, 1,200 at Dalton Barracks to the west of Abingdon, and a further 400 homes north-west of Grove (with the potential for further growth post-2031).

The current pupil forecasts include only the housing numbers in the previously adopted Local Plan Part 1 and not the increases now included in the Local Plan Part 2, unless they are already permitted sites.

Watlington

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Chalgrove Community Primary School	Chalgrove	2452	ACA	52	30	27	210	183	30	29	30	The currently permitted housing for Chalgrove may require an additional 0.5 form of entry in school provision. Potential to expand the existing school is being assessed, with a decision on whether to progress to be taken once it is confirmed whether or not there will be development at Chalgrove Airfield. Part of the Acer MAT.
Ewelme CE (VA) Primary School	Ewelme	3752	VA	0	13	9	90	77	16	10	19	
Lewknor CE Primary School	Lewknor	3184	VC	0	15	15	90	90	15	10	10	School makes use of the church hall. School's current admission number is higher than that supported by its accommodation. School aspiration for construction of additional classroom.
RAF Benson Community Primary School	Benson	2450	COM	0	45	29	240	179	45	35	41	School experiences unpredictable pupil numbers due to serving MoD families. School's current admission number is higher than that supported by its accommodation.
Stadhampton Primary School	Stadhampton	2455	ACA	0	15	12	105	88	15	2	2	Converted to academy in February 2019 as part of the Acer Trust. Little Bears Pre-school on site.
Watlington Primary School	Watlington	2459	COM	60	45	29	315	249	45	33	32	
Total for partnership				112	163	121	1050	866	166	119	134	
% spare places						26%		18%		28%	19%	

Watlington

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Icknield Community College	Watlington	4082	ACA	11-16	140	143	700	693	140	139	146	Catchment also includes Chinnor, where there is significant housing growth, and which is shared with Lord Williams's School in Thame. The current school site area would not support significant expansion. The potential is being explored of relocating and expanding Icknield Community College onto Chalgrove Airfield development site if that development goes ahead, or acquiring additional land adjacent to the school's current site to support expansion. Youth Centre and Rainbow Corner Day Nursery on site.
% spare places										1%	-4%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	134	127	118	127	125	Forecasts do not include the large-scale redevelopment of Chalgrove Airfield consulted on as a potential allocation for the SODC Local Plan 2033. Icknield Community College's designated area includes Chinnor, which is also in the designated area of Lord Williams' School, Thame; the significant recent proposed/permitted housing in Chinnor could affect either school. Icknield also attracts pupils from Buckinghamshire, particularly Stokenchurch. As the local population grows, there will be a reduction in the number of non-catchment pupils who are unable to secure a place at the school. This could increase pressure on surrounding schools, including those in Buckinghamshire.
All primary	897	923	912	898	872	
Year 7	146	136	171	164	169	
All secondary	719	737	766	778	806	

Watlington

Comments on school capacity

Forward planning of school capacity in this area needs to be informed by decisions about the redevelopment of Chalgrove Airfield, which would have a major impact on demand for school places in this rural area. Moreover, the planning of secondary school capacity also needs to be informed by proposals outside this area, in particular at Berinsfield and Culham, and as far as Abingdon. Until the current SODC and VOWH Local Plan processes are completed, there is, therefore, uncertainty over the scale of growth required in school capacity and how this can best be provided. In the meantime, forecasts indicate a sustained shortage of secondary school places emerging after 2020, which may require temporary accommodation if the permanent solution is still awaiting Local Plan decisions.

Early Years Free Entitlement

The early years provision across this area currently meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Chalgrove	0	14	96	81	74	60	60	50	0	435	E of Chalgrove [120]; Newington Road, Stadhampton [65]; Newington Nurseries, Stadhampton [21], W of Marley Lane, Chalgrove [200]; Six Acres, Warborough [29].
Chinnor	68	91	238	96	27	8	0	0	0	528	Chinnor: Siareys Yard [22]; Crowell Road [120]; Kiln Lane [21]; Greenwood Avenue [80]; Lower Icknield Way [89]; Mill Lane [78]; Thame Lane [61]; Oakley Road [14]; Thame Road [39; 4 in plan period]. Also Mount Hill Farm, Tetsworth [39].
Watlington	0	0	0	0	0	114	114	32	0	260	Cuxham Road and Willow Close [60]; Pyrton Lane [60]; Britwell Road and Cuxham Road [140].
Total	68	105	334	177	101	182	174	82	0	1223	

Watlington

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The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Wheatley

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Beckley CE Primary School	Beckley	3256	ACA	0	20	21	157	120	20	8	10	Converted to academy in April 2019 as part of the River Learning Trust. As is common in village schools, intakes fluctuate from year to year.
Garsington CE Primary School	Garsington	3167	ACA	0	30	29	210	207	30	29	30	Converted to academy as part of the River Learning Trust.
Great Milton CE Primary School	Great Milton	3187	VC	0	30	28	210	174	30	13	13	
Horspath CE Primary School	Horspath	3161	ACA	0	20	20	140	142	20	21	20	Part of the River Learning Trust. Horspath Pre-school Nursery on site.
Little Milton CE (VA) Primary School	Little Milton	3755	VA	0	12	10	94	51	12	8	8	Accommodation configuration constrains the school's admission number.
Marsh Baldon CE Controlled School	Marsh Baldon	3188	VC	0	12	8	84	51	12	14	15	As is common in village schools, intakes fluctuate from year to year.
Sandhills Community Primary School	Oxford	2022	ACA	0	60	46	330	293	30	38	30	Converted to academy as part of the River Learning Trust in September 2018. Accommodation would support annual intake of 45; instead the school admits 60 in some years and 30 in others. For 2020 and 2021 the admission number is currently expected to be 30. Consideration could be given to permanently changing to an admission number of 45. Sandhills Pre-school Playgroup operates within school accommodation. School designated as 3-11 but does not offer nursery places at present.

Wheatley

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Wheatley CE Primary School	Wheatley	2009	ACA	0	60	27	420	255	60	35	38	Part of Oxford Diocesan Schools Trust (ODST). Shares site with the primary phase of John Watson (special) School and Wheatley Nursery School which is integrated. Wheatley Pre-school on site. Accommodation being reconfigured to provide additional special school places and address the suitability of the existing accommodation.
Total for partnership				0	244	189	1645	1293	214	166	164	
% spare places						23%		21%		22%	23%	

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Wheatley Park School	Wheatley	4077	ACA	11-18	180	183	1350	1068	180	184	180	Part of the River Learning Trust. Shares a site with the secondary age part of John Watson (special) School. Admission number reduced to 180 from 2018.
% spare places						-2%		21%		-2%	0%	

Wheatley

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	163	185	179	169	167	Forecasts do not yet include the housing proposed but not yet confirmed for Wheatley on the former Oxford Brookes campus. The Local Plan consultation included a proposal for 300 homes; a planning application has been submitted for 500 homes, but this had not been determined at the time of writing this Plan. Forecasts indicate a shortage of secondary school places from 2022 if Wheatley Park School remains at its current admission number of 180. However, this trend may be revised as the impact of the new Swan School in Oxford becomes clearer.
All primary	1298	1314	1329	1292	1269	
Year 7	180	172	173	219	208	
All secondary	1089	1083	1082	1110	1140	

Comments on school capacity

Combined Reception admission number shown above includes Sandhills at 30; in some years the school admits 60 while in other years it only admits 30 to stay within its capacity. The recent pressure on school places in this area has been partly due to its proximity to Oxford. Schools can offer sufficient places for their catchment demand most years. As more capacity has been provided within Oxford city, pressure in this area has reduced.

The scale of development on the former Oxford Brookes campus is still to be determined; there is a risk that development will be of such a scale it would exceed the primary school's capacity without making viable an expansion of the school.

Wheatley Park (secondary) School has reduced its admission number, but would need to increase it again to meet the currently forecast demand for places in 2022.

Nursery School

Wheatley Nursery School is a fully inclusive community Nursery School run by the county council. The Nursery School operates funded provision for 2 year olds under the name "Little Windmills", using governors powers. The Nursery is federated with John Watson special school, and offers 80 part time equivalent places for pupils aged 3 to 5.

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Great Milton	0	0	0	0	0	0	0	0	0	0	
Horspath and Barton	76	25	0	0	0	0	0	0	0	101	Bayswater Farm, Sandhills [50]; N of London Road, Wheatley [51].
Total	76	25	0	0	0	0	0	0	0	101	

Wheatley

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The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council had assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan had allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034: Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations, including 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Witney

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Aston & Cote CE Primary School	Aston	3120	VC	0	22	16	175	144	25	26	25	School considering provision of nursery places in 19/20 as on site pre-school closed last AY.
Ducklington CE Primary School	Ducklington	3122	VC	78	30	27	210	197	30	29	29	Age range 2-11.
Finstock CE Primary School	Finstock	3040	ACA	20	15	7	105	68	15	7	8	Part of The Mill Academy Academy Trust. As is common in small schools, intake numbers fluctuate from year to year.
Hailey CE Primary School	Hailey	3123	VC	20	15	15	105	100	15	12	12	Site offers potential for expansion of this school, which would be considered as part of strategic growth planning for school capacity across the Witney area in response to planned housing growth.
Madley Brook Community Primary School	Witney	2002	ACA	48	45	41	315	303	45	29	28	Local demand for school places has dipped as the housing development where this school is located has matured, but forecasts indicate a longer term recovery. Shares site and building with the primary phase of Springfield (special) School. Part of the River Learning Trust.
North Leigh CE Primary School	North Leigh	3128	ACA	0	30	23	210	181	30	23	24	Part of Oxford Diocesan Schools Trust (ODST). School has increased admission number to 30 which is expected to be sufficient to meet the needs of housing growth in the village. A new 2 classroom block has been completed and is now in use, and the academy trust are currently exploring the scope of the internal alterations required. North Leigh Pre-school on site.
Our Lady Of Lourdes (VA) Catholic Primary School	Witney	3822	ACA	0	30	23	210	181	30	16	20	Part of Dominic Barberi MAT.
Queen Emma's Primary School	Witney	2304	ACA	0	45	23	315	229	45	26	25	Converted to academy as part of the Mill Academy Trust. Little Oak Pre-school on site.

Witney

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
St Mary's CE Infant School	Witney	3207	ACA	0	30	27	90	86	30	31	30	Feeds into The Batt CE Primary School at KS2. Constrained site limits ability to grow. Part of Oxford Diocesan Schools Trust (ODST).
The Batt CE (VA) Primary School	Witney	3605	ACA	0	30	29	330	324	30	38	30	Part of Oxford Diocesan Schools Trust (ODST). Up to 30 additional children are admitted into Year 3 annually to accommodate transfer from St Mary's CE Infants School.
The Blake CE Primary School	Witney	3600	ACA	0	60	47	420	391	60	33	35	Part of Oxford Diocesan Schools Trust (ODST).
Tower Hill School	Witney	2303	ACA	84	30	17	210	184	30	30	30	Converted to academy as part of the River Learning Trust. School admits 2-year-olds under governors' powers (school age range 3-11).
West Witney Primary School	Witney	2601	COM	30	60	60	360	355	60	52	56	Expansion to 2 forms of entry on a permanent basis from Sept 2017, after taking over its admission number in 2016 to address a shortage of places. Capacity will need to be 420 places, but DfE approval for the final two classrooms is still awaited.
Witney Community Primary School	Witney	2302	ACA	0	30	25	210	195	30	33	30	Formal age range 3-11 but school does not run a nursery. PVI Nursery provision on site. Part of the River Learning Trust.
Total for partnership				280	472	380	3265	2938	475	385	382	
% spare places						19%		10%		19%	20%	

Witney

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
The Henry Box School	Witney	4050	ACA	11-18	240	195	1469	1123	240	154	162	Formed Mill Academy Trust with some of Witney partnership's primary schools.
Wood Green School	Witney	4052	ACA	11-18	210	209	1335	1035	210	225	234	Part of the Acer Trust. School admitted over its PAN in 2019. Incorporates a special resource unit for pupils with complex moderate learning difficulties. Shares a site with the secondary phase of Springfield (special) School.
Total for partnership					450	404	2804	2158	450	379	396	
% spare places						10%		23%		16%	12%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	388	387	426	396	422	Much of the impact of the planned housing growth in this area will be felt beyond the period covered by this Plan. Significant growth in pupil numbers is therefore expected in the longer term. Primary pupil numbers in the south/west of Witney are expected to grow first, leading to shortages of school places from 2021 onwards, which will be met through the new school due to open in 2021 (see below); primary pupil numbers in the north/east of Witney are forecast to start growing towards the end of this Plan period, once planned housing developments get underway.
All primary	2970	2947	2989	2999	2973	
Year 7	396	420	405	409	468	
All secondary	2198	2275	2323	2394	2482	

Comments on school capacity

Within Witney, demand for primary school places has previously risen rapidly, resulting in the expansion of West Witney Primary School ahead of the planned new school at North Curbridge/West Witney. A new school to serve the development west of Witney is due to open in 2021, to be called Windrush CE Primary School, sponsored by River Learning Trust. Beyond the period covered by this Plan, another new primary school would be required as part of the strategic housing allocation planned at North Witney, and planning for this development will also consider the potential of neighbouring schools to help meet the growth in demand. In the surrounding villages, schools currently have sufficient places to meet their catchment need, but may need to expand should there be significant local housing growth.

Options are being explored for how secondary education can best be organised to meet the needs of Witney's growing population. Additional Year 7 places are currently expected to be required for 2023 and 2024.

Witney

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments. The new schools planned in this area will include nursery classes.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Charlbury, North Leigh	0	79	85	60	0	0	0	0	0	224	N of Little Lees, Charlbury [22]; S of Forest Road, Charlbury [25]; Woodstock Road, Charlbury [11]; N of New Yatt Road, North Leigh [40]; S of New Yatt Road, North Leigh [76]; Witney Road, North Leigh [50].
Minster Lovell	0	0	0	35	50	40	0	0	0	125	W of Minster Lovell [125].
Witney Central	14	52	132	99	60	41	0	0	0	398	Dark Lane [14]; Witan Way [15]; Holloway Road [12]; N of Burford Road [260]; Springfield Oval [73]; Standlake Road, Ducklington [24].
Witney East	4	0	0	0	50	100	150	200	250	754	Woodstock Road [11; 4 in plan period]; East Witney [450; 225 in plan period]; North Witney [1400; 525 in plan period].
Witney West	29	250	206	225	225	133	182	50	0	1300	North Curbridge [1000]; Downs Road, Curbridge [257]; Thorney Leys [27; 16 in plan period]; Springfield Nursery [161; 13 in plan period]; Well Lane, Curbridge [14].
Total	47	381	423	419	385	314	332	250	250	2801	

The West Oxfordshire Local Plan 2031 was accepted by the Planning Inspectorate in August 2018, and adopted by the council in September. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011-2031, including 2,750 as a contribution towards Oxford's unmet housing need. Housing completions in the period 2011-2018 totalled 2,538 dwellings, with the rate of completions increasing significantly in the last 2 years.

The Plan includes a housing distribution of: Witney and surrounding area - 4,702 homes (of which 600 had been completed by 2017 and a further 1,186 permitted), including 1,000 at the west Witney strategic site (permitted) and 1,400 at the north Witney strategic site; Carterton and surrounding area - 2,680 homes (of which 362 had been completed by 2017 and a further 1,591 permitted); Chipping Norton and surrounding area - 2,047 homes (of which 240 had been completed by 2017 and a further 419 permitted); Eynsham/Woodstock area - 5,596 homes (of which 547 had been completed by 2017 and a further 1,422 permitted); and Burford/Charlbury area - 774 homes all of which were already completed or permitted by 2017.

Woodcote

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Checkendon CE (VA) Primary School	Checkendon	3801	VA	0	15	6	105	73	15	7	6	
Goring CE (VA) Primary School	Goring	3803	VA	0	30	25	240	228	30	24	26	School has temporarily expanded its capacity from 210 with temporary classrooms, to accommodate a bulge in Reception class admissions for 2012 & 2013. School and Diocese explored future capacity options in the context of the Neighbourhood Plan, but current forecasts indicate expansion not required at this time. Goring & Cleeve Pre-school on site.
Nettlebed Community School	Nettlebed	2504	COM	0	20	15	140	116	20	30	20	Happy Days Pre-school on site.
South Stoke Primary School	South Stoke	2507	COM	0	7	7	52	45	7	4	4	
Stoke Row CE (VA) Primary School	Stoke Row	3206	VA	0	15	12	105	84	15	8	10	Capacity significantly dependent on temporary accommodation. School has no hall - uses church hall.
Whitchurch Primary School	Whitchurch-on-Thames	2208	COM	0	20	21	140	145	20	23	20	Whitchurch Pre-school on site.
Woodcote Primary School	Woodcote	2510	COM	0	30	25	210	188	30	22	22	Cabin Pre-school lies between the primary and secondary school sites.
Total for partnership				0	137	111	992	879	137	118	108	
% spare places						19%		11%		14%	21%	

Woodcote

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Langtree School	Woodcote	4094	ACA	11-16	120	120	591	592	120	173	145	School attracts some pupils from outside the county. Demand for Year 7 places in 2019 is exceptionally high, and school admitted above admission number.
% spare places								0%	0%	-44%	-21%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	110	97	87	87	85	Pressure on school places in this area is also affected by the balance of supply and demand for places outside Oxfordshire. Actual demand for places has tended to exceed forecasts. An unusually large cohort is transferring from primary to secondary school in 2019.
All primary	854	854	826	788	747	
Year 7	145	121	128	132	129	
All secondary	630	642	657	674	684	

Comments on school capacity

Previous pressure on places at the Reception stage at a number of schools has now eased as birth rates have fallen, and in the absence of large-scale housing growth, but temporary solutions have been needed in the meantime. Spare capacity is not evenly distributed, and in some villages, if there were to be significant additional housing development, additional school capacity could be required, which in many cases will be challenging to provide due to constrained school sites. Secondary school capacity should be sufficient for catchment demand.

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Woodcote

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Cholsey	0	27	27	96	67	13	0	0	0	230	East End Farm, Cholsey [67]; Celsea Place, Cholsey [60]; Cholsey Meadows [14]; N of Charles Road, Cholsey [15]; Main Road, E Hagbourne [74].
Crowmarsh and Benson	38	60	60	174	234	321	192	116	60	1255	Mongewell Park, Mongewell [166]; Nosworthy Way, Mongewell [91]; N of Littleworth Road, Benson [187+241]; Benson NDP Site 2 [80]; Benson NDP Site 3/4 [241]; E of Benson Lane, Crowmarsh Gifford [150], S of Newnham Manor, Crowmarsh Gifford [100].
Watlington	0	0	0	0	0	114	114	32	0	260	Cuxham Road and Willow Close [60]; Pyrton Lane [60]; Britwell Road and Cuxham Road [140].
Woodcote	0	0	10	22	0	0	20	0	0	52	Reservoir site, Woodcote [20]; Chiltern Rise Cottage, Woodcote [22]; Cleeve Cottages, Goring [10].
Total	38	87	97	292	301	448	326	148	60	1797	

Woodcote

South Oxfordshire District Council (SODC) has a Core Strategy in place, adopted 2012, which plans for 11,487 new homes between 2006 and 2027 (over half of which had already been built by 2012). It concentrates planned housing growth on Didcot (6,300 new homes between 2006 and 2027), Thame (775), Wallingford (555) and Henley (400), with a further 1,154 homes to be allocated across 13 larger villages, including Goring, Nettlebed and Woodcote. In many cases the village housing sites will be identified through a Neighbourhood Plan process. The housing allocated through the Woodcote Neighbourhood Plan is included in the forecasts above, but not that in the Goring Neighbourhood Plan, which was adopted after these forecasts were calculated.

The council had submitted for Planning Inspector examination a new Local Plan to take into account revised (and increased) housing need analysis, including Oxford's unmet housing need, and extend to 2034. The council assessed South Oxfordshire's annual housing need as 632 homes per annum, with an uplift to 775 homes per annum to contribute to Oxford's unmet housing need. Across the plan's 23-year lifespan (2011-2034), this gives a total housing need of 22,775 homes. The submitted Local Plan would have made provision for 26,783 homes between 2011 and 2034, i.e. 4008 more than the assessed requirement. Of these, 15,455 homes had already been built, permitted or allocated by March 2019. The submitted Plan allocated a further seven strategic housing sites, totalling 14,400 homes, 9,275 of which expected to be completed by 2034:

Bayswater Brook (to the north east of Oxford): 1,100, completed by 2034; Berinsfield: 1,528 by 2034, 1,700 in total; Chalgrove Airfield: 1,763 by 2032, 3,000 in total; Culham: 1,528 by 2034, 3,500 in total; Grenoble Road (south of Oxford): 1,528 by 2034, 3,000 in total; Northfield (to the south east of Oxford): 1,528 by 2034, 1,800 in total; Wheatley: 300 completed by 2023.

In addition to the strategic sites in the submitted Local Plan, it also identified increased housing numbers in other locations: 807 homes from the revised neighbourhood plans at Henley-on-Thames, Thame, Sonning Common, and Woodcote; 46 homes from the emerging Local Plan allocations at Nettlebed; 1,200 homes from a "windfall" allowance - development that can occur without needing an allocation (e.g. infill development).

Following a change of administration after the May 2019 local elections, South Oxfordshire District Council Cabinet decided on 3 October to recommend withdrawing the submitted South Oxfordshire Local Plan. At the time of finalising this Pupil Place Plan, the government is considering its response to this decision, and further work on the new Local Plan is on hold. The current pupil forecasts include only the housing numbers in the adopted Core Strategy and not the increases proposed in the Local Plan, unless they are already permitted sites.

Woodstock

Primary schools	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Bladon CE Primary School	Bladon	3146	VC	0	14	13	98	99	14	13	14	A small extension to the school and internal alterations have enabled it to increase its admission number from 12 to 14, taking total capacity to 98. Constrained site would be expected to rule out further expansion.
Bletchingdon Parochial CE Primary School	Bletchingdon	3141	VA	30	15	13	105	74	15	11	11	Relocated to new building in 2015 with capacity increase. Nursery class also established.
Combe CE Primary School	Combe	3142	VC	0	15	16	105	109	15	13	14	
Kirtlington CE (VA) School	Kirtlington	3500	VA	0	15	6	105	64	15	15	15	Kirtlington Pre-school within school building.
Stonesfield Primary School	Stonesfield	2353	COM	0	30	19	150	120	30	17	17	Current admission number is higher than would be supported by the school's permanent accommodation.
Tackley CE Primary School	Tackley	3144	ACA	0	15	13	105	92	15	6	6	Following the opening of Heyford Park Free School, Tackley's admission number has reduced to 15 for 2017 onwards, allowing a temporary classroom to be removed. Tackley Pre-school now closed. School to consider age range extension in 18/19. Part of the Oxford Diocesan Schools Trust.
William Fletcher Primary School	Yarnton	2354	COM	0	45	47	315	265	30	30	30	Expanded from 1 form entry to 1.5 form entry to accommodate housing development in the village. Yarnton Pre-school on site. Admission number temporarily reduced to 30 for 2019 in line with a dip in local population. The potential for longer term expansion to 2 forms of entry is being explored in the context of housing proposals in the Cherwell Local Plan Partial review, but this would require additional site area.

Woodstock

Primary schools (cont)	Location	School code	Type of school as at May 2019	Nursery places pte for 2019/20	Published admission number for 2018/19	Reception pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
Woodstock CE Primary School	Woodstock	3145	VC	52	45	38	315	305	45	51	45	Previously expanded to 1.5 form entry; assessment of options to expand the school further are dependent on confirmation of the total scale of housing growth approved for Woodstock. The school would require a larger site area to be able to expand. Woodstock Under 5's Association (WUFA) are on site, but the permitted housing development at East Woodstock includes new early years accommodation, into which WUFA could relocate and expand. This would also release land for the primary school's expansion.
Wootton-by-Woodstock CE (VA) Primary School	Wootton-by-Woodstock	3657	ACA	0	10	3	70	48	10	2	2	Converted to academy in October 2018 as part of the Oxford Diocesan Schools Trust (ODST). The school's catchment extends down to Old Woodstock, where 120 homes are planned north of Hill Rise - timing of housing delivery is not yet confirmed, but currently expected towards the end of this Plan period. School has a tiny site and no hall.
Total for partnership				82	204	168	1368	1176	189	158	154	
% spare places						18%		14%		16%	19%	

Woodstock

Secondary schools	Location	School code	Type of school as at May 2019	Age range	Published admission number for 2018/19	Year 7 pupils 2018/19 (at May 2019)	Total capacity 2018/19 (at May 2019)	Total pupil numbers 2018/19 (at May 2019)	Published admission number for 2019/20	First preference applications for 2019/20	Allocation for 2019/20 (at July 2019)	Comments
The Marlborough Church of England School	Woodstock	4560	ACA	11-18	180	179	1138	1017	180	225	180	Academy investigating options for expanding by 1 form of entry to meet the needs of local housing growth. Includes resource unit for pupils with physical disability, speech, language & communication and autistic spectrum disorder special needs.
% spare places						1%		11%		-25%	0%	

Forecast demand for places	2019/20	2020/21	2021/22	2022/23	2023/24	Comment on forecasts
Reception	154	170	150	143	146	Much of the impact of the planned housing growth for Woodstock will be felt beyond the time period covered by this Plan. The Cherwell Local Plan Partial Review proposed an additional 500 new homes to the east of Woodstock, but the Planning Inspector's initial report suggested that this allocation be removed. That 500 homes has not been included in these pupil forecasts. Large-scale housing growth for Yarnton and Begbroke also proposed in the Cherwell Local Plan Partial Review is also not yet included in these forecasts.
All primary	1186	1239	1245	1215	1210	
Year 7	180	178	181	215	188	
All secondary	1047	1085	1094	1130	1136	

Comments on school capacity

Although pupil forecasts indicate that current primary school capacity would be sufficient for demand during this plan period overall, spare places are not evenly distributed, and the Combe/Woodstock/Bladon area is expected to continue to see sustained pressure on places. Additional primary school capacity will be needed within Woodstock, and the Cherwell Local Plan "Partial Review" proposal for a strategic large-scale housing development at Begbroke would require further significant increases in school capacity, including at least one new school. Current pupil forecasts indicate pressure on secondary school places in this area, which could be met by Marlborough School expanding by one form of entry. The academy is investigating options for achieving this. If the housing proposed in the Cherwell Local Plan "Partial Review" is proposed, it is expected that a new secondary school would be required in Begbroke, beyond the timescale of this Plan, but the size, nature and timing of this would be influenced by the balance of supply and demand for secondary school places in surrounding areas.

Woodstock

Early Years Free Entitlement

Early years provision across this area currently just meets the need of the local population. Additional capacity will be required to meet increased demand for places created by housing developments.

Housing developments included in forecasts (see previous section on general forecast methodology)

Area (based on MSOA) - number of dwellings	2017	2018	2019	2020	2021	2022	2023	2024	2025	2017-25	Comments - significant sites
Woodstock, Stonesfield, Bladon, Tackley	41	33	98	101	75	95	75	80	50	648	NE of Marlborough School [58]; Charity Farm, Stonesfield [37; 27 in plan period]; Home Farm, Bladon [27; 18 in plan period]; Nethercote Rd, Tackley [2 sites = 70+26]; E of Woodstock [300], N of Banbury Road [180], N of Hill Rise [120]; E of Farley Corner [12; 7 in plan period], Stonesfield [37].
Yarnton	0	0	16	0	0	0	0	0	0	16	Cassington Road [16].
Total	41	33	114	101	75	95	75	80	50	664	

This area straddles West Oxfordshire and Cherwell District Councils.

The West Oxfordshire Local Plan 2031 was accepted by the Planning Inspectorate in August 2018, and adopted by the council in September. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011-2031, including 2,750 as a contribution towards Oxford's unmet housing need. Housing completions in the period 2011-2018 totalled 2,538 dwellings, with the rate of completions increasing significantly in the last 2 years.

The Plan includes a housing distribution of: Witney and surrounding area - 4,702 homes (of which 600 had been completed by 2017 and a further 1,186 permitted); Carterton and surrounding area - 2,680 homes (of which 362 had been completed by 2017 and a further 1,591 permitted); Chipping Norton and surrounding area - 2,047 homes (of which 240 had been completed by 2017 and a further 419 permitted); Eynsham/Woodstock area - 5,596 homes (of which 547 had been completed by 2017 and a further 1,422 permitted), including 2,200 at the Garden Village, 1,000 at the west Eynsham strategic site (including 237 already permitted at Eynsham Nursery and Thornbury Road) and 670 across three sites in Woodstock (300 of which are already permitted); and Burford/Charlbury area - 774 homes all of which were already completed or permitted by 2017.

Woodstock

The Cherwell Local Plan 2011-2031 was adopted in July 2015. The Plan focuses housing growth on Bicester (9,764 new homes between 2014 and 2031) and Banbury (7,106 new homes), with a further 4,864 new homes across the rest of the district. For rural areas, in addition to strategic growth of 2,361 new homes at Upper Heyford, the Plan expects a further 750 homes to be delivered through developments of 10 or more homes across the most sustainable villages: Adderbury, Ambrosden, Arncott, Begbroke, Bletchington, Bloxham, Bodicote, Chesterton, Cropredy, Deddington, Finmere, Fringford, Fritwell, Hook Norton, Kidlington, Kirtlington, Launton, Milcombe, Sibford Ferris/Gower, Steeple Aston, Weston on the Green, Wroxton and Yarnton. Sites will be identified through the preparation of the Local Plan Part 2, through the preparation of Neighbourhood Plans where applicable, and through the determination of applications for planning permission.

Examination is underway of a "Partial Review" of the Cherwell Local Plan, which contains specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford's Unmet Need. The proposed distribution is for 1,180 homes across 2 sites in North Oxford; 330 homes across 2 sites south of Kidlington; 2,390 across Begbroke and Yarnton and 500 south east of Woodstock. The Planning Inspector issued a preliminary advice note in July 2019, proposing modifications to the Plan, including the deletion of the Woodstock allocation. CDC will be carrying out further work to respond to this, and hope to submit a modified Plan by the end of 2019. The current pupil forecasts include only the housing numbers in the adopted Local Plan, and permitted sites. The additional housing proposed in the Partial Review would generate significantly more pupils. The Partial Review includes policies requiring a new primary school north of Oxford; up to two new primary schools in Begbroke; a new primary school in Woodstock; land for the expansion of William Fletcher Primary School in Yarnton; and a new secondary school at Begbroke. These will need to be reviewed in the light of any modifications to the Plan. The exact school solution in each case will be confirmed at the time when planning applications are submitted, informed by the latest data, and may include expansions at one or more other schools as well as, or instead of, new schools.

6. SPECIAL EDUCATION PROVISION

Special Education & Disabilities Provision (SEND) is provided through a mixture of special schools and specialist resource provision units for children with a specific need, e.g. hearing impairment or autism, based on the sites of the mainstream schools. In addition to the maintained schools shown, a number of independent providers supply additional capacity.

Despite expansions of SEND capacity in recent years, demand for special school places has grown faster than supply, resulting in increasing dependence on the independent and non-maintained special school sector. Planning is now underway to significantly expand Oxfordshire's maintained provision for SEND, to not only keep up with population growth, but also ensure the High Needs budget is used more effectively to better meet the needs of children with Special Educational Needs & Disabilities.

Categories of SEND

ASD	Autistic Spectrum Disorder
HI	Hearing Impairment
MLD	Moderate Learning Difficulty
MSI	Multi-Sensory Impairment
PD	Physical Disability
PMLD	Profound and Multiple Learning Difficulty
SEMH	Social, Emotional and Mental Health. This category replaced Behavioural, Emotional and Social Difficulty (BESD) in 2015.
SLCN	Speech, language and Communication Needs
SLD	Severe Learning Difficulty
SPLD	Specific Learning Difficulty (e.g. dyslexia, dyspraxia, attention deficit-hyperactivity disorder, dyscalculia and dysgraphia)
VI	Visual Impairment

A new SEND Sufficiency Strategy was approved by the County Council Cabinet in December 2018, and is available online at www.oxfordshire.gov.uk. The Strategy includes four strands:

1. Ensure that all early years providers and mainstream schools support an inclusive approach to education: all children, where possible, to be educated in their local school, receiving the support they need at the earliest stage, and providers following an inclusive approach for all children with special educational needs and disabilities.
2. Review of the current resource base provision across the County: conduct a review of all base provision needs and undertake a consultation with schools who currently have a resource base provision onsite to identify any opportunities to increase capacity.
3. Review of current special school sites: focus on whether further expansion is possible.
4. New schools: open two new special schools focused on social, emotional and mental health needs and Autism in Bloxham Grove and Didcot, and rebuild Northfield school.

Specialist Provision across Oxfordshire – overview

Locality	Community special school, ages 2 to 19	Countywide special school provision	Primary resourced provision and capacity	Secondary resourced provision and capacity	FE Colleges
Banbury	Frank Wise	Northern House Behaviour, SEMH, ages 5 to 11.	New base starting at Longford Park 2018, potentially moving to new Cherry Fields Primary School on Southam Road (opening 2020) (C&I/SEMH, 10 places).	The Warriner School (C&I, 12 places)	Activate Learning, Banbury
Bicester	Bardwell	Northfield , Behaviour, SEMH, boys aged 11-18.	Base included in new Gagle Brook Primary School in NW Bicester, which opened 2019 (C&I, 6 places).	Base included in new Whitelands Academy, SW Bicester, opening 2020 (SEMH, 8 places)	Activate Learning, Bicester
Woodstock, Charlbury, Chipping Norton	Springfield	Woodeaton, SEMH, ages 7 -18 (including residential provision).	<i>Potential for a resource base in planned new primary schools in Chipping Norton and Eynsham – no dates yet confirmed.</i>	The Marlborough School (C&I, PD, 25 places)	Abingdon & Witney College
Witney, Burford, Carterton		Iffley Academy, complex moderate learning difficulties and SEMH, ages 10-18.	Base included in new Windrush CE Primary School, Witney, opening 2021 (C&I, 8 places). <i>Potential for a resource base in planned new primary school in Carterton – no date yet confirmed.</i>	Wood Green School (MLD, 20 places)	Abingdon & Witney College
Oxford City	Mabel Prichard	Endeavour Academy, severe learning difficulties, autism and challenging behaviour, ages 8 to 19 (including residential provision).	New Marston Primary School (HI, 4 places). St Nicholas Primary School (C&I, 15 places). Base included in new Barton Park Primary School, Oxford, opening 2020 (SEMH, 8 places).	The Cherwell School (C&I – 20 places; HI - 10 places)	Activate Learning, OCVC
Abingdon	Kingfisher	St Andrew's Primary School (C&I, 7 places).	<i>The county council seeks to establish a resource base within the planned new N Abingdon primary school – target date, early 2020s.</i>	Fitzharrys School (C&I, 12 places) Larkmead School (HI, 8 places)	Abingdon & Witney College
Thame, Wheatley, Watlington, Berinsfield	John Watson	New SEMH/ASD schools planned for Bloxham and Didcot.	<i>The county council seeks to establish a resource base within the new Grove Airfield all-through school – target date, 2023.</i>	Lord Williams (C&I, 20 places)	AWC/ Henley College
Faringdon, Grove, Wantage	Fitzwaryn	Base included in new Aureus Primary School, which opened 2019 (SEMH, 8 places).	<i>Growth of school provision in Didcot provides opportunities for additional SEND capacity.</i>		
Didcot, Wallingford, Henley & Goring	Bishopswood				

Special Schools and Pupil Referral Unit								
School, town (Ofsted grade)	Main area served	Caters for	Pupils on roll 2016/17 (May 17)	Pupils on roll 2017/18 (May 18)	Pupils on roll 2018/19 (May 19)	No. of funded places 2018/19	No. of funded places 2019/20	Comments and growth planning
Bardwell School (Good) Bicester	Bicester, Kidlington and surrounding villages	Pupils with SLD and PMLD aged 2-19	70	71	75	78	85	Academy - part of The Gallery Trust The school shares a site with the Cooper (secondary) School, Glory Farm Primary School, and Rainbow Pre School . 2016: 6th form building completed, part-funded by EFA targeted post-16 Capital. Project replaced 11 existing places previously in a temporary building and provided 9 new places. 2018: conversion of former Children's Centre building to provide Foundation Stage facility for Bardwell School. Relocation of Foundation Stage children releases 2 classrooms within the main school building to provide 12 additional pupil places. 2021: target date for completion of Special Provision Fund project to add a further 16 places and a new school hall.
Bishopswood school (Good) Henley and Sonning Common	South Oxon: Wallingford to Goring, Sonning common, Henley-on-Thames and Watlington. Approximately 1/3 come from Reading and Wokingham	Pupils with SLD and PMLD aged 2-16	56	64	68	58.5	61	Bishopswood School departments (nursery, primary and senior) are co-located at: - Valley Road Nursery, Henley - Sonning Common Primary - Maiden Erlegh Chiltern Edge School, Sonning Common Potential being explored of relocating existing senior provision from shared accommodation into vacant standalone building at Maiden Erlegh Chiltern Edge School. Project would address existing deficiencies and create additional accommodation.
Endeavour Academy (Good) Headington, Oxford	Oxfordshire	SLD, autism and challenging behaviour ages 8 - 19	26	30	32	30	35	Opened Sept 2014 through the Free School programme, part-funded by the county council and from developer funding. Operated by MacIntyre Academies Trust. Includes 12-bedroom residential provision.
Fitzwaryn School (Outstanding) Wantage	Wantage, Faringdon and surrounding villages	Pupils with complex moderate learning, SLD and PMLD aged 2-19	91	96	107	101.42	108	Academy, part of Propeller Academy Trust. 2012: replacement of post-16 "temporary" accommodation providing 16 places in purpose built accommodation. 2018: new building to create 2 additional classrooms – 16 additional places
Frank Wise School (Outstanding) Banbury	Banbury, Chipping Norton and surrounding villages Also serves South Northants	Pupils with SLD and PMLD, aged 2-19	104	111	120	111.05	116.8	2016: completion of project to replace temporary classrooms with a new purpose-built post-16 unit (part-funded by EFA Demographic Growth Capital Fund). Project replaced 24 existing places and provided 8 new places.

School, town, ofsted grade	Main area served	Caters for	Pupils on roll 2016/17 (May 17)	Pupils on roll 2017/18 (May 18)	Pupils on roll 2018/19 (May 19)	No. of funded places 2018/19	No. of funded places 2019/20	Comments and growth planning
Iffley Academy (Outstanding) Oxford	Oxfordshire, countryside provision.	Pupils with complex moderate learning difficulties and SEMH needs, aged 10-18	135	151	157	155.75	180	2016: Funding provided by OCC to bring former classroom space back in to use and increase capacity by 8 places. School currently being rebuilt by ESFA. Pressure on capacity here will be relieved by the opening of a new free school in North Oxfordshire, to be run by the same academy trust (the Gallery Trust).
John Watson School (Good) Wheatley	Thame, Wheatley, Watlington, Chinnor, Benson, Ewelme and surrounding villages, Risinghurst and part of Oxford City (Barton Estate).	Pupils with SLD and PMLD, aged 2-19	80	72	80	84	87	The school is co-located with Wheatley mainstream schools. Wheatley Nursery School is a fully inclusive attached nursery; primary aged pupils share the campus of Wheatley CE Primary School; and secondary pupils are based at Wheatley Park School. 2018: expansion of capacity on primary site - 8 additional places in 2018 and another 8 in 2019. 2021: target date for completion of Special Provision Fund project on secondary site, replacing temporary buildings and adding 16 additional places.
Kingfisher School (Good) Abingdon	Abingdon, Didcot, Wallingford and surrounding villages as well as Cumnor.	Pupils with SLD and PMLD, aged 2-19	79	78	90	84.92	88	Academy, part of the Propeller Academy Trust. 2014: another class opened due to increasing numbers, using existing space in the school. 2017: new 3 classroom building to replace 2 classroom prefabricated building and create an additional classroom. The project replaced 16 existing places and provided 8 new places.
Mabel Prichard School (Good) Oxford	Oxford	Pupils with SLD and PMLD, aged 2-19	87	95	100	99.67	106	The school has two sites both co-located with mainstream schools: Oxford Academy and Orchard Meadow Primary School. Orchard Meadow and Mabel Prichard Schools share an Integrated Foundation Stage Unit for children aged 2-5. 2011: secondary and post-16 accommodation new builds. 2017: single-class extension built to be used as a classroom for D&T / Art, and enable the existing D&T classroom to be converted into a KS2 classroom, providing 8 additional places.
Northern House School (Outstanding) Oxford	Oxfordshire	Pupils with SEMH needs aged 5-11	80	86	86	86	86	Academy 2011: new 6 classroom block with new food technology room to replace "temporary" buildings, re-providing 40 places and adding 8 additional places. Ongoing explorations of alternative sites.

School, town, ofsted grade	Main area served	Caters for	Pupils on roll 2016/17 (May 17)	Pupils on roll 2017/18 (May 18)	Pupils on roll 2018/19 (May 19)	No. of funded places 2018/19	No. of funded places 2019/20	Comments and growth planning
Northfield School (Inadequate) Oxford	Oxfordshire	Pupils with SEMH needs, aged 11-18 Boys only	59	71	44	76.58	64	2017: new 2 classroom modular building providing 16 additional places. 2018: significant repairs needed, reducing capacity available for use; longer term options being explored. Pupil numbers have been reduced in the meantime. 2019: academy sponsor being sought after the school was put into Special Measures by Ofsted in November 2018. Statutory proposal to expand the school to a capacity of 108 places, including rebuilding the school with purpose built accommodation, approved July 2019, subject to an academy sponsor being appointed. In the meantime, pupil numbers have been managed down temporarily. 2021/22: new building expected to open with increased capacity.
Springfield School (Good) Witney	West Oxfordshire	Pupils with SLD and PMLD, aged 2-16	98	107	111	107.33	110	Primary provision is co-located with Madley Brook Community Primary School including an integrated nursery. Secondary provision is co-located on the Wood Green School site. Additional class opened September 2015.
Woodeaton Manor School (Good education, outstanding for residential) Woodeaton	Oxfordshire	Pupils with SEMH needs aged 7 -18	68	78	84	80.67	84	The school has residential provision, open term-time only and weekdays. 2012: new modular classroom building to support lowering of school age range to admit a class of up to 6 primary age pupils. 2017: internal alterations to create 2 additional classrooms, increasing capacity by 8 places in the first instance. 2018: capacity increased by a further 8 places.
Meadowbrook College (Good)	Countywide	Pupils with SEMH needs, aged 5-16	The college is place funded by the DfE for 106 fulltime places. These are offered as a mixture of short-term and longer term, and full-time or part-time, provision. Numbers therefore fluctuate throughout the year.			Oxfordshire's Pupil Referral Unit and Integration Service. Located across three sites in Oxfordshire: Banbury, Oxford and Abingdon, this is an Alternative Provision (AP) Academy that provides full and part-time education and support to students who are finding it difficult to access their mainstream schools. Part of the Radcliffe Academy Trust.		
Oxfordshire Hospital School (Outstanding)	Countywide	Children medically unfit to attend school	n/a	n/a	n/a	n/a	n/a	Temporarily based at St Nicholas Primary School, Oxford, related to Swan School being built on former location (Meadowbrook site). Alternative permanent location and venues for outreach service being sought.
NEW: free school approved to be run by the Gallery Trust	North Oxfordshire	Pupils with ASD and SEMH needs and associated C&L needs, aged 7-18	n/a	n/a	n/a	n/a	n/a	2017: The Gallery Trust submitted successful free school bid for a new 100 place school in north Oxfordshire, which will free up spaces at the existing Ifley Academy and reduce travel distances for many pupils. Planning permission has been granted and the schools is due to open 2021/2022.
NEW: planned special school Didcot	Didcot	Pupils with ASD and SEMH needs, aged 7-18	n/a	n/a	n/a	n/a	n/a	Site agreed as part of a Didcot housing development. Free School bid conditionally approved by DfE. Current expectation is for the site to be available from 2023.

Annex: Full 5-year pupil forecasts by planning area and year

For details of which schools are in each planning area, see the main data sections.

PRIMARY PUPILS	Reception	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Abingdon PA1 - North								
2018 ACTUAL	279	251	284	282	261	269	297	1923
2019 FORECAST	279	282	254	288	285	264	271	1923
2020 FORECAST	274	281	285	258	290	288	266	1942
2021 FORECAST	291	275	284	289	262	294	292	1987
2022 FORECAST	271	293	278	288	292	266	297	1985
2023 FORECAST	281	275	297	283	292	295	270	1993
Abingdon PA 2 - East								
2018 ACTUAL	128	146	137	155	108	99	115	888
2019 FORECAST	137	128	146	137	156	110	99	913
2020 FORECAST	136	139	130	148	139	158	112	962
2021 FORECAST	138	138	141	132	150	141	160	1000
2022 FORECAST	137	140	140	143	135	153	144	992
2023 FORECAST	137	139	142	142	147	137	155	999
Abingdon PA 3 - South								
2018 ACTUAL	205	202	205	196	185	166	185	1344
2019 FORECAST	207	214	211	214	205	194	175	1420
2020 FORECAST	189	214	219	217	220	211	200	1470
2021 FORECAST	206	198	222	227	226	228	220	1527
2022 FORECAST	192	215	204	230	233	233	234	1541
2023 FORECAST	205	201	221	214	236	240	240	1557
Abingdon PA 4 - West								
2018 ACTUAL	70	54	78	74	51	45	67	439
2019 FORECAST	73	72	56	80	76	53	47	457
2020 FORECAST	80	75	75	59	83	79	56	507
2021 FORECAST	82	82	78	77	61	85	81	546
2022 FORECAST	78	84	85	80	79	63	87	556
2023 FORECAST	85	79	86	85	80	81	65	561
Banbury								
2018 ACTUAL	634	631	666	676	657	634	646	4544
2019 FORECAST	663	644	641	673	683	664	641	4609
2020 FORECAST	710	673	650	647	675	685	666	4706
2021 FORECAST	682	713	678	657	652	679	689	4750
2022 FORECAST	749	681	712	680	657	652	675	4806
2023 FORECAST	782	744	679	710	678	657	650	4900
Bicester PA 1 - North Town								
2018 ACTUAL	141	127	153	159	160	178	180	1098
2019 FORECAST	149	143	129	155	161	162	180	1079
2020 FORECAST	145	151	147	131	157	163	164	1058
2021 FORECAST	151	147	155	149	132	158	164	1056
2022 FORECAST	148	154	152	157	153	134	160	1058
2023 FORECAST	157	148	156	152	158	153	134	1058
Bicester PA2 - South East								
2018 ACTUAL	201	183	182	200	189	179	174	1308
2019 FORECAST	176	205	187	186	204	193	183	1334
2020 FORECAST	202	179	207	189	188	206	195	1366
2021 FORECAST	205	203	181	210	192	191	209	1391
2022 FORECAST	194	206	205	182	210	192	191	1380
2023 FORECAST	210	193	205	205	181	210	192	1396
Bicester PA3 - South West								
2018 ACTUAL	182	196	210	204	190	179	189	1350
2019 FORECAST	217	186	200	214	208	194	183	1402
2020 FORECAST	241	218	187	201	215	209	195	1466
2021 FORECAST	233	242	221	189	203	217	211	1516
2022 FORECAST	225	234	245	222	191	205	219	1541
2023 FORECAST	234	226	236	246	223	193	207	1565
Bicester PA4 - North Villages								
2018 ACTUAL	80	88	83	86	77	77	82	573
2019 FORECAST	84	81	90	86	89	77	79	586
2020 FORECAST	92	88	83	94	90	93	81	621
2021 FORECAST	84	95	93	83	96	91	94	636
2022 FORECAST	79	85	101	96	89	101	96	647
2023 FORECAST	84	80	91	104	102	90	105	656
Bloxham								
2018 ACTUAL	201	202	201	218	227	212	235	1496
2019 FORECAST	226	206	208	207	221	231	216	1515
2020 FORECAST	232	228	211	215	212	226	236	1560
2021 FORECAST	209	234	232	215	220	217	238	1565
2022 FORECAST	212	213	238	238	220	226	222	1569
2023 FORECAST	219	218	219	239	243	226	228	1592

PRIMARY PUPILS	Reception	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Burford PA1 - North								
2018 ACTUAL	85	85	87	96	77	90	74	594
2019 FORECAST	91	88	88	90	99	80	93	629
2020 FORECAST	81	92	90	90	92	101	82	628
2021 FORECAST	79	82	94	92	92	94	103	636
2022 FORECAST	77	80	84	95	93	93	95	617
2023 FORECAST	79	78	82	85	97	94	94	609
Burford PA2 - South								
2018 ACTUAL	88	101	87	89	95	77	75	612
2019 FORECAST	87	89	102	88	90	96	78	630
2020 FORECAST	92	88	91	104	90	92	98	655
2021 FORECAST	93	92	89	91	104	90	92	651
2022 FORECAST	89	93	94	90	92	105	92	655
2023 FORECAST	93	89	94	95	90	90	103	654
Carterton								
2018 ACTUAL	234	218	209	192	193	173	173	1392
2019 FORECAST	196	232	221	214	203	195	172	1433
2020 FORECAST	182	199	234	224	216	202	195	1452
2021 FORECAST	177	189	202	237	224	217	202	1448
2022 FORECAST	209	177	188	205	238	223	216	1456
2023 FORECAST	217	208	180	187	207	237	226	1462
Chipping Norton								
2018 ACTUAL	218	218	243	260	228	236	212	1615
2019 FORECAST	251	227	226	251	270	239	247	1711
2020 FORECAST	223	260	236	233	259	279	248	1738
2021 FORECAST	198	233	266	240	237	262	284	1720
2022 FORECAST	192	205	240	270	250	246	271	1674
2023 FORECAST	201	199	212	249	276	255	253	1645
Cumnor								
2018 ACTUAL	208	223	230	233	212	212	226	1544
2019 FORECAST	221	215	233	235	240	221	221	1586
2020 FORECAST	216	229	218	236	239	242	225	1605
2021 FORECAST	213	226	232	223	240	242	244	1620
2022 FORECAST	213	223	231	235	230	245	246	1623
2023 FORECAST	220	219	230	234	237	233	247	1620
Didcot								
2018 ACTUAL	557	582	572	523	474	450	486	3644
2019 FORECAST	592	581	608	598	547	498	467	3891
2020 FORECAST	656	611	598	625	615	560	512	4177
2021 FORECAST	640	680	632	620	647	637	585	4441
2022 FORECAST	602	661	700	649	638	667	657	4574
2023 FORECAST	655	627	687	727	681	663	690	4730
Eynsham								
2018 ACTUAL	117	141	139	164	152	150	136	999
2019 FORECAST	111	125	149	147	171	161	147	1011
2020 FORECAST	124	120	130	154	154	176	165	1023
2021 FORECAST	140	133	127	140	162	161	184	1047
2022 FORECAST	128	148	140	134	149	169	171	1039
2023 FORECAST	137	136	157	149	143	156	175	1053
Faringdon								
2018 ACTUAL	249	278	248	267	264	240	234	1780
2019 FORECAST	267	256	285	255	274	271	247	1855
2020 FORECAST	289	272	262	291	261	280	277	1932
2021 FORECAST	273	292	276	264	294	263	281	1943
2022 FORECAST	278	274	296	278	269	299	268	1962
2023 FORECAST	290	280	276	298	279	271	301	1995
Henley								
2018 ACTUAL	109	121	136	142	151	126	146	931
2019 FORECAST	125	112	124	139	145	154	129	928
2020 FORECAST	128	126	114	126	141	147	156	938
2021 FORECAST	124	129	127	115	127	142	148	912
2022 FORECAST	124	125	130	128	116	128	143	894
2023 FORECAST	121	124	124	130	128	115	127	869
Kidlington								
2018 ACTUAL	164	175	183	191	185	153	171	1222
2019 FORECAST	185	163	174	182	190	184	152	1230
2020 FORECAST	172	183	162	173	181	189	183	1243
2021 FORECAST	163	170	183	159	170	178	186	1209
2022 FORECAST	161	161	170	181	157	168	176	1174
2023 FORECAST	159	159	161	167	178	157	168	1149
Oxford PA1 - North								
2018 ACTUAL	189	208	206	205	205	169	199	1381
2019 FORECAST	211	198	218	216	215	215	179	1452
2020 FORECAST	213	221	209	228	226	226	224	1547
2021 FORECAST	189	222	230	219	238	236	235	1569
2022 FORECAST	194	197	231	235	228	246	245	1576
2023 FORECAST	199	202	206	240	248	235	254	1584

PRIMARY PUPILS	Reception	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Oxford PA2 - East								
2018 ACTUAL	404	414	428	442	426	423	441	2978
2019 FORECAST	378	414	422	436	450	435	432	2967
2020 FORECAST	402	385	421	428	442	454	441	2973
2021 FORECAST	377	415	394	428	436	450	464	2964
2022 FORECAST	370	388	422	403	437	444	457	2921
2023 FORECAST	377	379	394	427	409	444	451	2881
Oxford PA3 - Central								
2018 ACTUAL	449	439	459	492	455	419	382	3095
2019 FORECAST	415	453	443	464	495	460	423	3153
2020 FORECAST	442	419	455	446	467	498	463	3190
2021 FORECAST	420	447	422	458	448	471	501	3167
2022 FORECAST	419	421	449	424	457	449	474	3093
2023 FORECAST	430	421	424	451	429	460	452	3067
Oxford PA4 - South								
2018 ACTUAL	278	300	309	336	313	293	343	2172
2019 FORECAST	279	277	299	308	335	312	292	2102
2020 FORECAST	282	276	274	296	305	332	309	2074
2021 FORECAST	275	283	277	272	294	303	330	2034
2022 FORECAST	262	275	280	275	272	294	303	1961
2023 FORECAST	273	261	271	280	272	271	293	1921
Sonning Common								
2018 ACTUAL	86	90	98	101	103	93	107	678
2019 FORECAST	73	90	94	102	105	107	97	668
2020 FORECAST	75	73	90	94	102	105	107	646
2021 FORECAST	78	75	74	91	95	103	106	622
2022 FORECAST	80	78	76	74	91	95	103	597
2023 FORECAST	79	80	79	76	76	91	95	576
Thame								
2018 ACTUAL	253	226	240	276	244	229	237	1705
2019 FORECAST	258	253	226	240	276	244	228	1725
2020 FORECAST	227	258	253	227	240	276	244	1725
2021 FORECAST	263	226	258	252	227	240	275	1741
2022 FORECAST	244	272	224	254	249	226	238	1707
2023 FORECAST	245	242	270	224	251	249	226	1707
Wallingford								
2018 ACTUAL	223	224	217	198	203	201	216	1482
2019 FORECAST	245	226	227	220	201	206	204	1529
2020 FORECAST	243	247	231	232	225	206	211	1595
2021 FORECAST	217	244	251	233	234	227	208	1614
2022 FORECAST	248	217	249	251	232	234	228	1659
2023 FORECAST	252	246	218	247	249	232	234	1678
Wantage								
2018 ACTUAL	351	355	340	392	333	314	350	2435
2019 FORECAST	354	364	368	353	405	346	327	2517
2020 FORECAST	394	365	376	380	365	417	358	2655
2021 FORECAST	401	402	372	385	389	374	426	2749
2022 FORECAST	406	409	409	377	391	395	380	2767
2023 FORECAST	446	413	415	415	386	398	402	2875
Watlington								
2018 ACTUAL	121	121	134	131	138	112	123	880
2019 FORECAST	134	122	122	135	132	139	113	897
2020 FORECAST	127	136	124	124	137	134	141	923
2021 FORECAST	118	128	139	126	126	139	136	912
2022 FORECAST	127	117	128	138	125	125	138	898
2023 FORECAST	125	125	114	124	136	124	124	872
Wheatley								
2018 ACTUAL	191	188	200	213	169	168	177	1306
2019 FORECAST	163	192	189	201	214	170	169	1298
2020 FORECAST	185	163	192	189	201	214	170	1314
2021 FORECAST	179	186	164	193	190	202	215	1329
2022 FORECAST	169	179	187	166	195	192	204	1292
2023 FORECAST	167	170	182	190	169	197	194	1269
Witney PA1 - North								
2018 ACTUAL	155	175	194	167	180	194	175	1240
2019 FORECAST	139	159	179	198	171	184	198	1228
2020 FORECAST	138	142	162	182	201	174	187	1186
2021 FORECAST	150	143	148	165	185	204	177	1172
2022 FORECAST	144	155	146	152	172	192	211	1172
2023 FORECAST	155	150	161	154	159	177	197	1153
Witney PA2 - South								
2018 ACTUAL	216	256	270	242	232	238	241	1695
2019 FORECAST	249	223	263	277	248	238	244	1742
2020 FORECAST	249	256	225	263	278	251	239	1761
2021 FORECAST	276	253	257	229	266	282	254	1817
2022 FORECAST	252	278	255	259	232	269	282	1827
2023 FORECAST	267	257	280	253	259	233	271	1820

PRIMARY PUPILS	Reception	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Woodcote								
2018 ACTUAL	112	121	123	126	122	122	149	875
2019 FORECAST	110	115	124	126	129	125	125	854
2020 FORECAST	97	113	120	129	131	134	130	854
2021 FORECAST	87	100	117	122	131	133	136	826
2022 FORECAST	87	89	102	118	124	133	135	788
2023 FORECAST	85	89	90	104	120	125	134	747
Woodstock								
2018 ACTUAL	169	160	155	190	155	167	177	1173
2019 FORECAST	154	175	166	161	196	161	173	1186
2020 FORECAST	170	160	185	176	171	206	171	1239
2021 FORECAST	150	176	165	189	180	175	210	1245
2022 FORECAST	143	156	180	174	195	186	181	1215
2023 FORECAST	146	149	160	188	178	199	190	1210
OXFORDSHIRE TOTAL								
	Reception	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
2018 ACTUAL	7347	7499	7706	7918	7414	7087	7420	52391
2019 FORECAST	7499	7510	7672	7876	8089	7583	7231	53460
2020 FORECAST	7708	7640	7646	7809	8008	8213	7707	54731
2021 FORECAST	7561	7853	7781	7771	7930	8126	8340	55362
2022 FORECAST	7503	7683	7971	7881	7891	8048	8239	55216
2023 FORECAST	7812	7606	7799	8074	7997	7988	8147	55423

SECONDARY PUPILS	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Total
Abingdon								
2018 ACTUAL	484	473	458	444	419	179	165	2622
2019 FORECAST	548	496	485	451	439	198	154	2771
2020 FORECAST	497	561	509	479	464	210	170	2890
2021 FORECAST	533	510	574	501	493	217	181	3008
2022 FORECAST	606	549	527	566	519	232	187	3185
2023 FORECAST	622	621	566	520	582	241	200	3352
Banbury								
2018 ACTUAL	514	482	482	423	472	165	200	2738
2019 FORECAST	513	524	491	485	424	215	145	2797
2020 FORECAST	500	520	536	499	494	191	187	2927
2021 FORECAST	526	510	538	541	509	218	167	3009
2022 FORECAST	554	539	527	550	553	224	189	3136
2023 FORECAST	526	563	558	537	559	242	195	3180
Bicester								
2018 ACTUAL	518	494	474	446	423	189	158	2702
2019 FORECAST	550	521	498	483	445	206	160	2863
2020 FORECAST	572	557	524	505	488	215	174	3036
2021 FORECAST	583	583	562	541	510	236	182	3197
2022 FORECAST	623	595	589	575	546	247	198	3373
2023 FORECAST	610	633	594	599	578	264	207	3485
Bloxham								
2018 ACTUAL	251	251	223	218	225	55	83	1306
2019 FORECAST	285	258	258	230	225	80	51	1387
2020 FORECAST	271	290	265	265	237	80	74	1482
2021 FORECAST	284	278	290	273	273	84	74	1556
2022 FORECAST	284	290	288	290	282	97	78	1609
2023 FORECAST	286	290	290	290	290	101	89	1636
Burford								
2018 ACTUAL	247	269	241	208	195	94	122	1376
2019 FORECAST	238	245	267	239	206	113	87	1395
2020 FORECAST	239	237	244	266	238	119	104	1447
2021 FORECAST	238	238	236	244	266	137	110	1469
2022 FORECAST	242	237	237	235	243	154	127	1475
2023 FORECAST	239	240	235	235	233	140	142	1464
Carterton								
2018 ACTUAL	124	96	100	102	107	22	23	574
2019 FORECAST	99	123	95	99	101	28	19	564
2020 FORECAST	103	98	122	94	98	26	24	566
2021 FORECAST	115	102	97	120	92	26	23	574
2022 FORECAST	129	115	102	97	120	24	22	609
2023 FORECAST	137	128	114	101	96	31	21	628
Chipping Norton								
2018 ACTUAL	179	142	144	161	161	89	87	963
2019 FORECAST	170	183	146	148	165	93	81	986
2020 FORECAST	195	173	186	149	151	96	85	1035
2021 FORECAST	194	198	176	189	152	88	87	1084
2022 FORECAST	222	198	203	181	194	88	80	1166
2023 FORECAST	209	225	202	206	184	113	80	1219

SECONDARY PUPILS	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Total
Cumnor								
2018 ACTUAL	207	202	181	183	178	118	107	1176
2019 FORECAST	210	210	205	184	186	110	112	1217
2020 FORECAST	210	215	215	210	189	115	105	1258
2021 FORECAST	210	216	220	221	216	117	109	1309
2022 FORECAST	232	215	221	225	225	133	111	1362
2023 FORECAST	234	236	219	225	230	139	127	1410
Didcot								
2018 ACTUAL	626	535	456	500	457	220	156	2950
2019 FORECAST	644	636	545	527	497	239	190	3278
2020 FORECAST	662	654	647	620	535	259	205	3582
2021 FORECAST	683	673	666	721	630	277	222	3872
2022 FORECAST	790	696	687	748	736	322	239	4217
2023 FORECAST	773	803	710	767	762	372	278	4464
Eynsham								
2018 ACTUAL	204	207	206	206	205	116	130	1274
2019 FORECAST	210	210	213	212	212	135	106	1298
2020 FORECAST	210	215	215	218	217	140	124	1339
2021 FORECAST	210	217	221	222	225	143	128	1366
2022 FORECAST	236	216	223	228	228	148	131	1410
2023 FORECAST	221	243	224	230	235	150	136	1439
Faringdon								
2018 ACTUAL	237	215	237	206	181	72	82	1230
2019 FORECAST	266	239	217	239	208	74	68	1310
2020 FORECAST	270	268	242	220	242	84	69	1396
2021 FORECAST	270	271	270	243	221	98	79	1453
2022 FORECAST	270	271	272	271	244	90	92	1510
2023 FORECAST	270	269	270	271	269	99	84	1532
Henley								
2018 ACTUAL	178	179	176	167	160	0	0	860
2019 FORECAST	200	180	174	178	169	0	0	901
2020 FORECAST	180	203	175	180	182	0	0	920
2021 FORECAST	211	184	198	183	184	0	0	960
2022 FORECAST	205	215	179	206	186	0	0	991
2023 FORECAST	194	208	210	185	208	0	0	1005
Kidlington								
2018 ACTUAL	147	157	166	162	125	73	53	883
2019 FORECAST	167	147	157	166	162	57	64	921
2020 FORECAST	133	168	149	159	168	74	50	902
2021 FORECAST	160	134	169	149	159	77	65	913
2022 FORECAST	162	161	134	170	150	73	68	918
2023 FORECAST	154	162	161	135	170	69	64	915
Oxford								
2018 ACTUAL	1065	1099	1075	1030	975	670	590	6504
2019 FORECAST	1255	1055	1089	1065	1020	739	545	6769
2020 FORECAST	1191	1256	1052	1086	1062	783	587	7016
2021 FORECAST	1273	1198	1261	1052	1086	812	616	7299
2022 FORECAST	1312	1284	1208	1273	1056	846	640	7619
2023 FORECAST	1293	1317	1293	1216	1281	834	670	7904
Sonning Common								
2018 ACTUAL	69	86	82	48	76	0	0	361
2019 FORECAST	99	69	86	82	48	0	0	384
2020 FORECAST	90	99	69	86	82	0	0	426
2021 FORECAST	100	90	100	70	87	0	0	447
2022 FORECAST	99	100	90	100	70	0	0	459
2023 FORECAST	96	99	100	91	100	0	0	486
Thame								
2018 ACTUAL	329	348	318	314	313	271	224	2117
2019 FORECAST	320	333	352	322	318	263	242	2149
2020 FORECAST	309	322	334	353	323	267	234	2142
2021 FORECAST	336	310	323	336	355	271	238	2169
2022 FORECAST	372	337	311	323	336	298	242	2219
2023 FORECAST	323	370	335	309	322	282	266	2207
Wallingford								
2018 ACTUAL	194	213	191	192	195	126	130	1241
2019 FORECAST	219	193	212	190	191	137	112	1253
2020 FORECAST	203	221	195	214	192	134	121	1280
2021 FORECAST	217	205	223	197	216	134	119	1311
2022 FORECAST	223	219	207	225	199	151	119	1343
2023 FORECAST	227	223	219	207	225	139	134	1374
Wantage								
2018 ACTUAL	248	278	311	269	279	165	129	1679
2019 FORECAST	266	255	285	289	269	146	148	1658
2020 FORECAST	256	274	264	266	297	141	131	1629
2021 FORECAST	310	264	283	247	275	156	127	1661
2022 FORECAST	365	320	275	266	257	144	140	1767
2023 FORECAST	316	372	328	256	273	135	129	1809

SECONDARY PUPILS	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Total
Watlington								
2018 ACTUAL	143	160	145	125	120	0	0	693
2019 FORECAST	146	143	160	145	125	0	0	719
2020 FORECAST	136	147	145	162	147	0	0	737
2021 FORECAST	171	137	149	146	163	0	0	766
2022 FORECAST	164	174	140	151	149	0	0	778
2023 FORECAST	169	166	176	142	153	0	0	806
Wheatley								
2018 ACTUAL	183	196	171	197	169	92	60	1068
2019 FORECAST	180	183	196	171	197	95	67	1089
2020 FORECAST	172	180	183	196	171	111	70	1083
2021 FORECAST	173	172	180	183	196	96	81	1082
2022 FORECAST	219	173	173	181	183	110	70	1110
2023 FORECAST	208	220	174	173	181	103	81	1140
Witney								
2018 ACTUAL	404	323	374	388	373	138	158	2158
2019 FORECAST	396	409	328	379	393	169	124	2198
2020 FORECAST	420	399	412	331	382	179	152	2275
2021 FORECAST	405	425	404	416	335	177	161	2323
2022 FORECAST	409	410	429	409	421	157	159	2394
2023 FORECAST	468	414	414	434	413	198	141	2482
Woodcote								
2018 ACTUAL	120	119	119	119	115	0	0	592
2019 FORECAST	145	122	121	121	121	0	0	630
2020 FORECAST	121	148	125	124	124	0	0	642
2021 FORECAST	128	124	150	128	127	0	0	657
2022 FORECAST	132	131	127	153	131	0	0	674
2023 FORECAST	129	135	134	130	156	0	0	684
Woodstock								
2018 ACTUAL	179	180	175	176	169	62	76	1017
2019 FORECAST	180	180	181	176	177	101	51	1047
2020 FORECAST	178	180	180	181	176	106	84	1085
2021 FORECAST	181	178	180	180	181	106	88	1094
2022 FORECAST	215	181	178	180	180	109	87	1130
2023 FORECAST	188	214	180	177	179	108	90	1136
OXFORDSHIRE TOTAL								
2018 ACTUAL	6850	6704	6505	6284	6092	2916	2733	38084
2019 FORECAST	7306	6914	6761	6581	6298	3198	2527	39585
2020 FORECAST	7118	7385	6988	6863	6659	3330	2751	41094
2021 FORECAST	7511	7217	7470	7103	6951	3470	2857	42579
2022 FORECAST	8065	7626	7327	7603	7208	3647	2980	44456
2023 FORECAST	7892	8151	7706	7436	7679	3760	3133	45757

Highway Asset Management Plan 2019 - 2024

DRAFT 0.8

December 2019

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1 Asset Management Principles

As described in our *Asset Management Policy*, our approach to asset management planning is based on two fundamental principles; whole life costing and risk-based decision making.

1.1 Whole life costing

Whole life costing, with reference to highways maintenance in Oxfordshire, is an investment and appraisal methodology, which assesses the total cost of an asset over its whole life. Oxfordshire County Council primarily considers the initial cost of the various maintenance treatment options and profiles the total cost of these treatment options, including intermediate maintenance, over a set analysis period. The main factors which will affect the whole life cost of an individual asset are:

- type and quality of construction
- degree and type of damage and degradation.
- use (e.g. for carriageways this will be type and volume of traffic)
- speed and quality of response to damage and degradation.

All assets will eventually require some form of maintenance treatment, irrespective of design life, initial construction type or importance. The questions are normally, "how frequently?" and "at what cost?" to restore the pavement back to a serviceable level.

In the concept of whole life costing, the lowest initial cost treatment may not always be the most cost effective option over the whole life of the asset. The maintenance strategy which is determined to be the most cost effective option over the entire life of the asset forms the basis of the *Lifecycle Plan*.

We consider whole life costs in the lifecycle planning process that we carry out to identify maintenance need for our individual assets. This information is a key input into the asset management planning process.

1.2 Risk based decision making

We consider risk in our asset management process at a number of levels:

- for individual assets, such as structures, we identify asset need on a risk basis
- where maintenance need exceeds available budget we prioritise on the basis of risk
- risk is a key input in our overall maintenance planning and prioritisation process and is used to help define the work programme for the next five years.

2 Asset Base

2.1 Asset inventory

As an authority, we manage nearly 4,500km of roads, more than 3,000km of footways, and more than one million individual assets.

Asset Group	Quantity (approx)	Unit
Roads	4,481	Km
Footways	3,170	Km
Bridges (excl PROW)	1,116	No.
Street Lights	80,000	No.
Illuminated Signs	3,627	No.
Illuminated Bollards	3,829	No.
Traffic Signal Sites	405	No.
Non-illuminated Signs	43,949	No.
Road Markings	3,001	Km
Drainage Assets	159,926	No.
Highway Trees	800,000	No.
Safety Barrier	116	Km
Public Rights of Way	4,200	Km

TABLE 1 - OXFORDSHIRE

2.2 Asset value

Our asset base has a total value of **£6.1 billion**, this is made up of the individual assets as shown in Figure 1.

¹ Note: Within Oxfordshire's current asset database cycle infrastructure is not identified as a separate asset group and is included within the carriageway and footway asset inventory. Oxfordshire is looking at ways to capture this information and add it to the asset database.

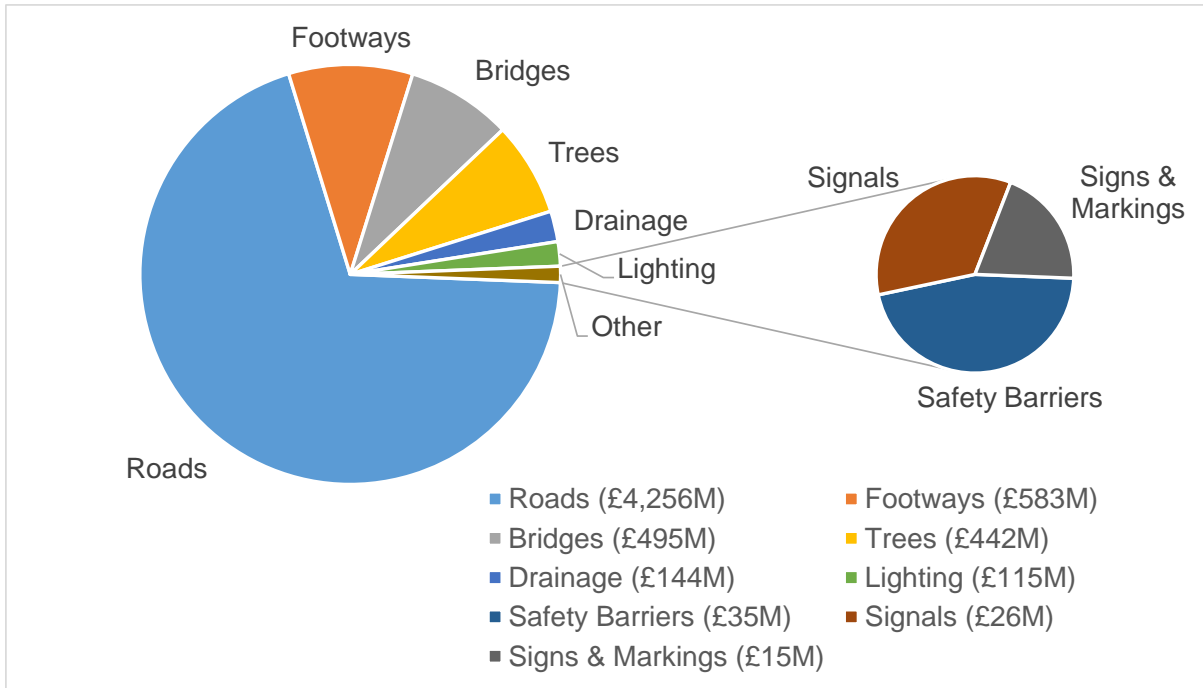


FIGURE 1 - ASSET VALUE

2.3 Expected service life

The expected service life of our assets ranges between five years (road markings) and one hundred and twenty years (structures and rural trees).

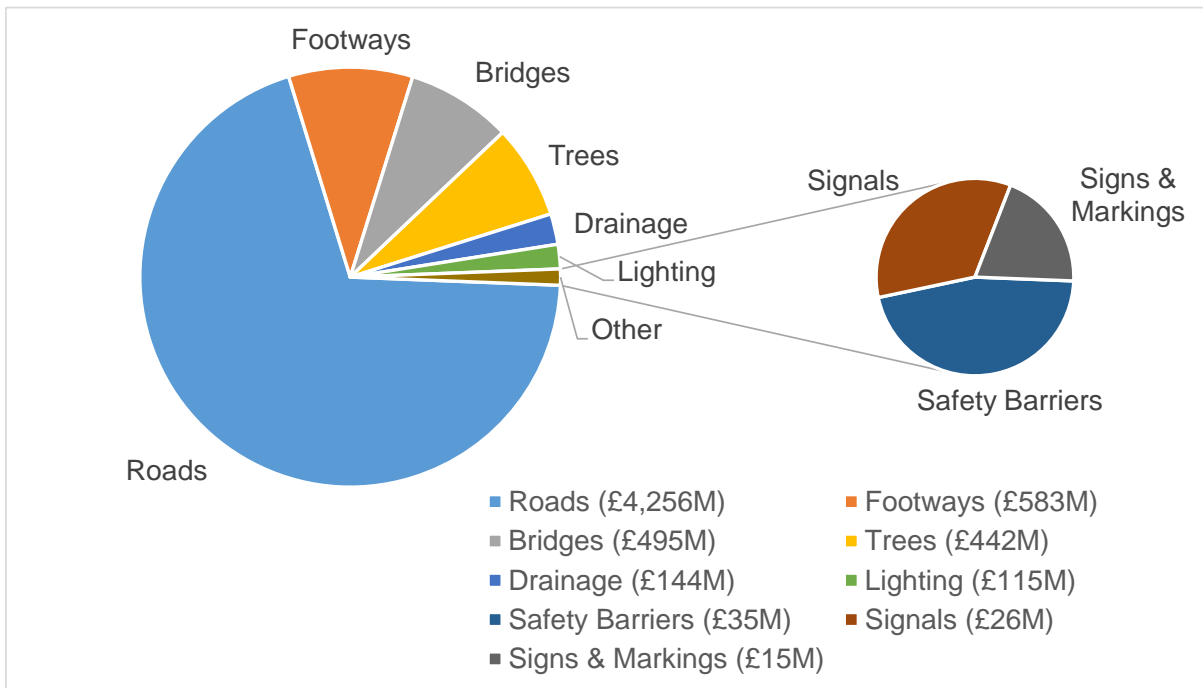


FIGURE 2 - EXPECTED SERVICE LIFE

3 Asset Management Planning Process

3.1 Planning process

The asset management planning process is illustrated in the following diagram. The key step in the process is our **collaborative planning workshop(s)** in which asset owners and our supply chain come together to consider and balance wide range of factors (including maintenance need, risks, councillor priorities and local needs for individual assets or areas) to come up with an indicative maintenance programme.

This indicative programme, along with the resulting outcome measures, is subject to engagement with councillors and other key stakeholders, before being presented to Cabinet for scrutiny and approval prior to delivery.

The process is illustrated in Figure 3 and is described in the subsequent sections.

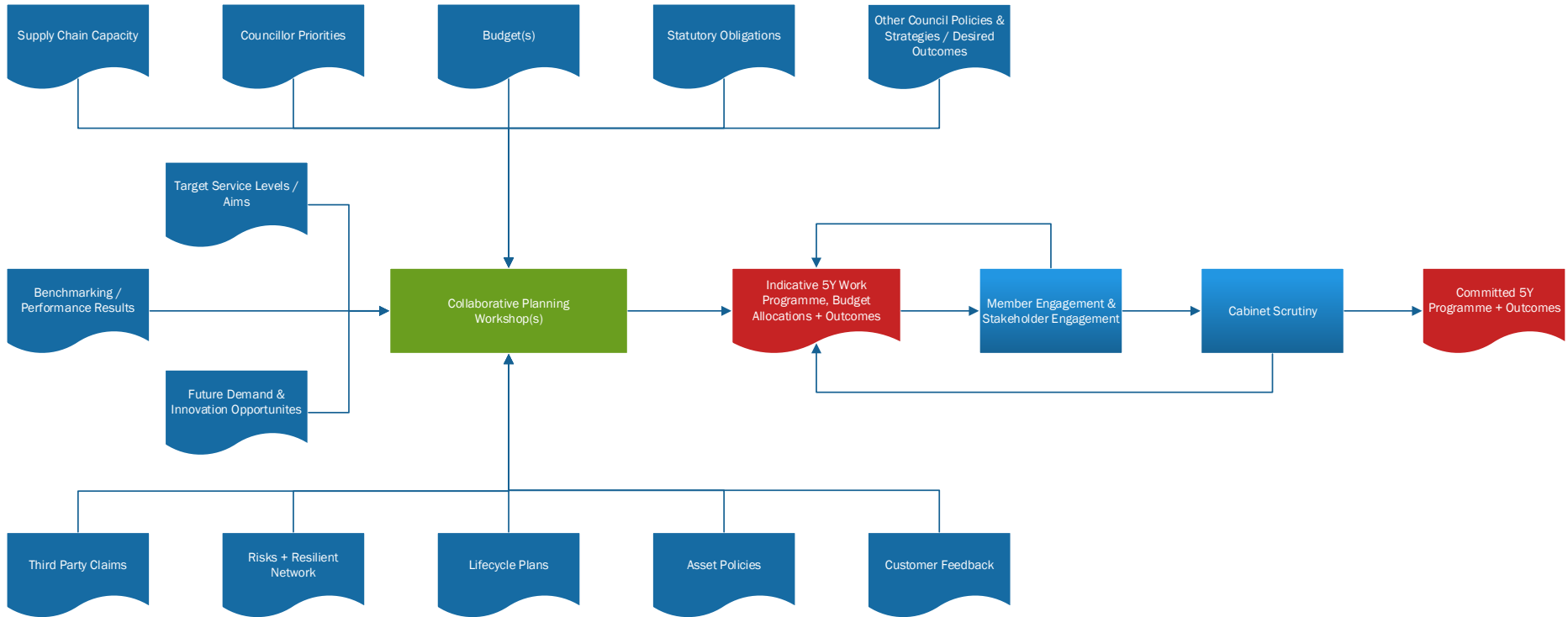


FIGURE 3 - ASSET MANAGEMENT PLANNING PROCESS

3.2 Inputs

The various inputs to the planning process are described in the following sections. Where possible, the information will be presented on a map using the output from our various asset management systems.

Statutory obligations

Oxfordshire has a number of legal obligations and powers that govern the way that it manages the road network.

- *Highways Act 1980* sets out the main statutory duties for the council, which include a duty to maintain roads in safe condition.
- *Traffic Management Act 2004* gives the council the duty to keep the traffic moving on the road network.
- *Flood and Water Management Act 2010* covers the management of flood risk associated with extreme weather.

In addition to legal duties, there are a number of sources of national good practice guidance including in particular *Well-Managed Highway Infrastructure: A Code of Practice (2016)*.

Council policies, strategies and outcomes

We will consider council policies and strategies that are pertinent to highway asset management. In particular this will include:

- *Active & Healthy Travel Strategy*
- *Air Quality Strategy*
- *Digital Infrastructure Policy*
- *Energy Strategy*
- *Rights of Way Management Plan*
- *Science Transit Strategy*

Budgets

Clearly the capital and revenue budgets are one of the main factors in determining the maintenance programme over the next five years.

The following table shows the indicative capital budget split between asset types and other expenditure areas.

Asset Group	2019-20	2020-2021	2021-22	2022-23	2023-24
Carriageways	£22,846	£22,200	£21,175	£19,674	£21,029
Footways	£750	£750	£750	£900	£1,000
Drainage	£1,400	£1,450	£1,600	£1,800	£1,800
Structures	£2,302	£2,300	£2,300	£3,100	£5,000
PROW	£200	£225	£250	£300	£350
Safety Fences	£0	£0	£0	£75	£750
Street Lighting	£775	£775	£775	£700	£973
Signals	£252	£283	£302	£302	£402
Agency Agreements	£1,700	£1,513	£1,470	£1,457	£2,745
Risk and Other Costs	£1,741	£756	£784	£825	£851
TOTAL	£31,966	£30,252	£29,406	£29,132	£34,900

TABLE 2 - ANNUAL CAPITAL BUDGET ALLOCATIONS (£,000s)

In addition to the capital budget, the annual revenue budget is expected to be in the order of **£16.5 million** over the same period. This is illustrated in Figure 4 below.

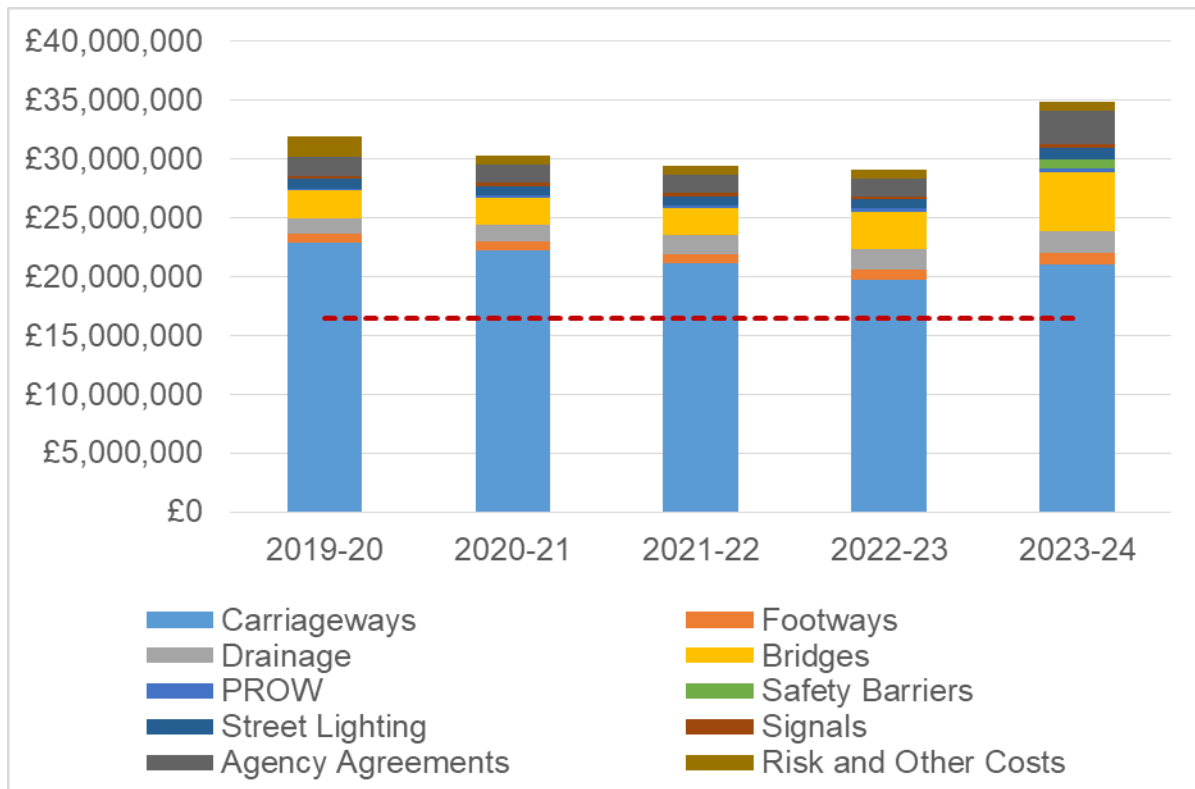


FIGURE 4 - ANNUAL CAPITAL & REVENUE BUDGET ALLOCATIONS

Maintenance need (from asset *Lifecycle Plans*)

Individual *Lifecycle Plans* have been developed for the main asset types:

- carriageways
- structures
- drainage
- footways
- street lighting
- signals
- green estate
- safety barriers
- public rights of way
- embankments.

These have identified maintenance need based on a consideration of maintenance strategy and available options based on the most appropriate approach, i.e.:

- deterioration modelling
- expected service life
- risk.

We will also consider the relevant asset policies and associated service aims (the policies are included in Annex A), including:

- *Asset Management Policy*
- *Coloured Surfacing Policy*
- *Decluttering Policy*
- *Drainage Policy*
- *Grass Cutting Policy*
- *Highway Electrical Assets Policy*
- *Highway Safety Inspection Policy*
- *Highway Safety Policy*

- *Highway Tree and Vegetation Policy*
- *Safety Barriers & Fences Policy*
- *Public Rights of Way Policy*
- *Road Markings and Road Studs Policy*
- *Routine, Reactive and Cyclic Maintenance Policy*
- *Street Furniture and the Street Environment Policy*
- *Structures Policy*
- *Traffic Signs Policy*
- *Tree & Vegetation Policy*
- *Winter Service Policy*

Potential maintenance schemes

We will consider any lists of potential capital maintenance schemes, including outstanding schemes from previous years and programmes of non-urgent defect repairs.

Risks (e.g. flooding incidents, etc.)

A range of risk factors are considered including:

- accidents and incidents
- age and construction of asset
- bus routes and other sustainable transport corridors
- cycleways and commuter routes
- future demands (e.g. location of planned developments)
- historic flooding incidents
- resilient network
- socio-economic importance
- strategic importance or hierarchy
- the location of defects, including historic hot-spots or clusters
- traffic flow.

Third party claims

We will consider the location of third party claims, including historic hot spots or clusters.

Network intelligence

We will also consider knowledge of the network from:

- Local Area Teams
- Service Provider.

This will include qualitative and quantitative data driven intelligence about planned network improvement schemes, etc. as well as potential future developments or other changes that might impact on the highway asset over the next five years.

Benchmarking and Performance Results

Where relevant, we will consider:

- results from APSE, CQC, NHT surveys plus the results of other benchmarking exercises
- comparison with other authorities, including our partnering authorities in England's Economic Heartland.

Customer feedback

Customer feedback will be considered from complaints, service requests or other feedback specifically sought from the public through our stakeholder engagement process.

Councillor priorities

We will also consider knowledge of councillor priorities, local needs, historic issues, or feedback specifically sought through our stakeholder engagement process.

Target service levels

The *Asset Management Strategy* states that:

1. “Our aim is for the condition of the highway network in Oxfordshire [*based on the combined ‘Red’ and ‘Amber’ score for A&B Class Roads derived from the SCANNER RCI values*] to be better than average when compared to our regional neighbours in Buckinghamshire, Gloucestershire, Hampshire, Northamptonshire, Surrey and Warwickshire; and that
2. We also aim to achieve a level of customer satisfaction with the highway service that is better than the national average [*based on the NHT Survey*]”.

We will therefore consider the nationally reported, as well as internal performance indicators and target service levels including:

- carriageway condition indicators (e.g. Single Data List 130-01, 130-02 and 130-03)
- structures condition indicators (BCI)
- footway condition indicator
- average age of lighting and signals stock
- number of flooding incidents
- number of defects
- average defect response
- customer satisfaction.

Lessons learned

We will formally consider the lessons identified from the past, including from the previous year’s maintenance programme delivery.

Future demand and innovation

We will consider future developments and innovation opportunities to understand the potential impact on future maintenance priorities (e.g. through accelerated obsolescence), these may include:

- future growth
- changes in travel patterns
- technology and data
- treatments and materials
- automated vehicles
- electric vehicles and related infrastructure.

When developing the maintenance programme we will also endeavour to co-ordinate maintenance activities with specific innovation developments.

Deliverability, coordination and supply chain capacity

Finally, we will consider the deliverability of the programme including:

- network impact and traffic management
- efficient working practices

- supply chain capacity
- future market and strategy directions.

3.3 Collaborative planning workshop(s)

A series of collaborative planning workshops will be held to consider the various inputs described in the previous section and identify:

- i. any changes to budget allocations
- ii. an indicative, prioritised work programme for the next five years
- iii. outcomes to be delivered (e.g. outputs to be delivered, performance outcomes to be achieved).

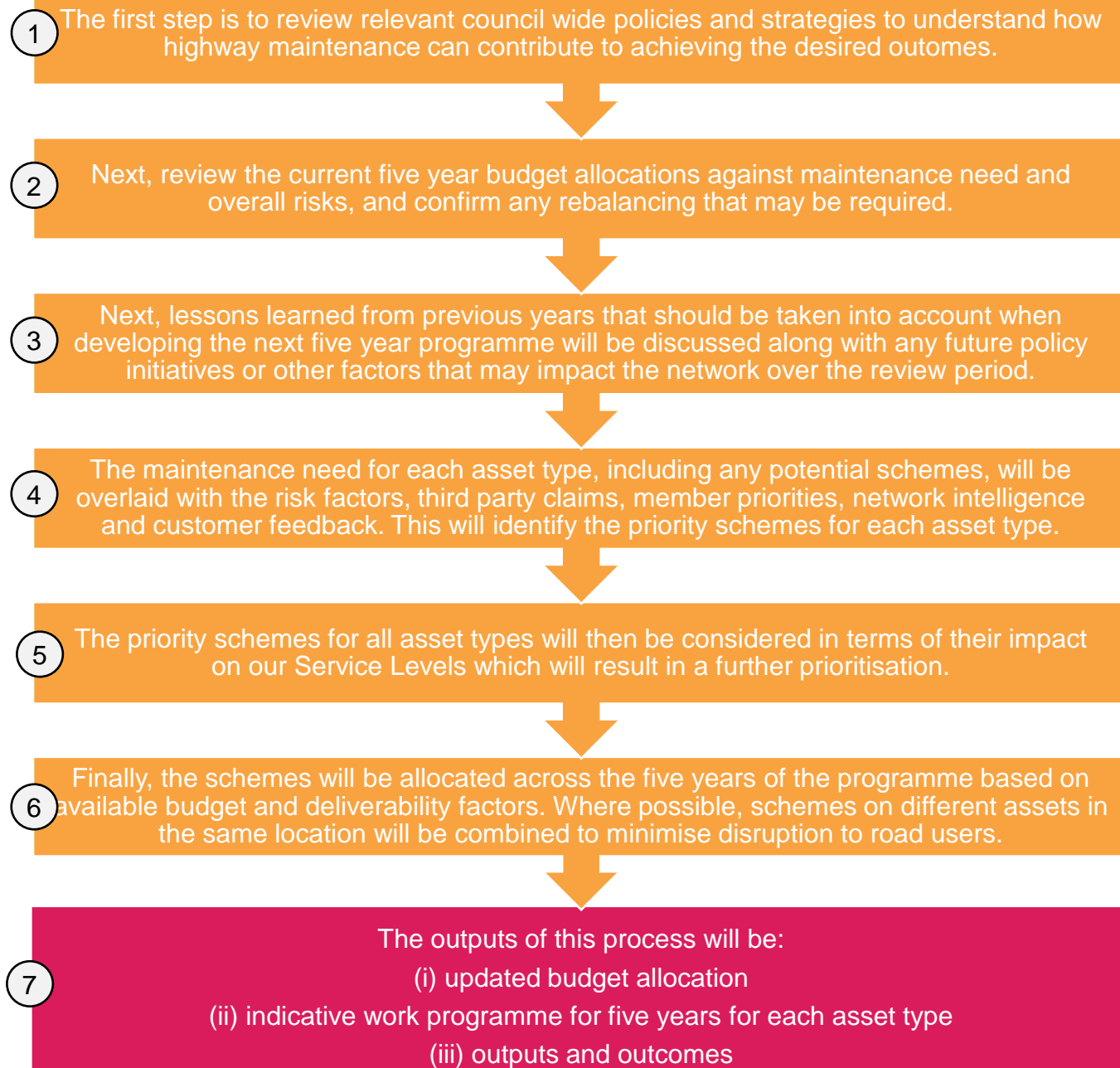
Given the volume of information to be considered, and the number of different perspectives, the workshop may extend over a number of sessions.

Attendees

The attendees at the workshop will include the following:

- Service Lead - Highway Maintenance (Chair)
- Group Manager - Asset Renewals
- Principal Officer - Asset Renewals
- Asset Owners with responsibilities for:
 - carriageways
 - footways
 - structures
 - drainage
 - lighting
 - signals
 - green estate
 - public rights of way
 - safety barriers
 - embankments
- representatives from Area Teams
- representatives from Service Provider.

Prioritisation process



3.4 Stakeholder engagement

We will consult with key internal stakeholders once the indicative work programme has been produced. In particular, this will include the Digital Infrastructure Team, Energy Team, iHUB, etc. who will help ensure the programme reflects, and is co-ordinated with, future innovation opportunities and that, as far as possible, existing infrastructure remains fit-for-purpose.

In terms of programme delivery, stakeholders (internal or external) will be defined and engaged with from the pre-design stage of a scheme or works programme, depending on their level of involvement. These levels of involvement will be defined in tiers to ensure that the correct individuals and organisations are contacted at the appropriate time.

We will liaise with stakeholders as and when appropriate for the type of works. This will be done until the works are completed. In certain circumstances, i.e. where a lesson has identified stakeholders may be contacted post completion to identify what could have been done better (or what worked well).

3.5 Councillor engagement

As part of the review of governance and member engagement the council has created a number of localities within Oxfordshire. These localities are based around the main market towns and they align with the council's electoral divisions. There are two localities in each district for the rural districts with Oxford City comprising the final locality. Localities are an excellent way to engage with local councillors about issues affecting their locality or to work with them to develop new strategies and policies and keep them informed about local developments.

There is a councillor specifically dedicated as the Transport Portfolio Holder and they are engaged with on a regular basis to ensure that they are aware of any issues developments within the service.

On an annual basis the forward programme of works is taken to cabinet for sign off. This signed programme will then form the basis for the following year's programme of works.

3.7 Outputs

The outputs from the asset management planning process will be the following:

1. updated budget allocation between asset types (if necessary), including key changes since last five year plan
2. five year capital maintenance programme for all assets
3. service levels and outcomes (e.g. performance indicators to be achieved given level of funding)
4. maintenance outputs to be achieved (e.g. volume of treatments)
5. resource implications
6. delivery risks.

4 Performance Management

Throughout the five year period of the asset management plan, we will actively monitor our performance in delivering the plan

4.1 Benchmarking

We will carry out annual benchmarking of our performance against other authorities. This will include:

- asset condition
- NHT public satisfaction survey
- APSE performance network.

We will also compare our performance our neighbours in the South East and other members of England’s Economic Heartland.

We will monitor our position in relation to our target service levels on an annual basis, and will take corrective actions if necessary.

4.2 Performance indicators

As described previously, we will set appropriate targets for a range of performance indicators relating to the asset and our wider highway maintenance service that are linked to the various budgets.

- carriageway condition indicators (e.g. Single Data List 130-01, 130-02 and 130-03)
- structures condition indicators (BCI)
- footway condition indicator
- average age of lighting and signals stock
- number of flooding incidents
- number of defects
- average defect response
- customer satisfaction.

We also have a number of Service Performance Indicators (SPIs) that form part of our maintenance contract that are used to monitor the performance of our Service Provider.

As described more fully in our *Performance Management Framework* we will monitor our performance on a monthly basis, and will take corrective actions if necessary.

4.3 Maintenance outputs

We will monitor delivery of the maintenance programme against the output targets defined in the planning process on a monthly basis and will take corrective action where necessary.

4.4 Efficiency gains

We will monitor efficiency gains on an annual basis through our involvement in the CQC Efficiency Network.

5 Continuous Improvement

5.1 Management and service review

Oxfordshire carried out a Lean review of its Highway Service in 2017. This helped to shape the current structure of the service. There are no further Lean reviews programmed for the service however the directorate's Service Improvement Team has been tasked with reviewing the outcomes of the 2017 review and they are looking at the wider transport service.

Our Service Lead - Highway Maintenance will conduct annual management reviews of the asset management planning process to identify any opportunities for improvement and any corrective actions that need to be taken. Operational processes are reviewed every six months (in conjunction with our term maintenance provider) to ensure they are current and fit for purpose.

5.2 Improvements to asset management planning process

Planned improvements to asset management system

We will continue to review our asset management practices in line with national guidance and best practice learned from other authorities as well as the various highways, asset management and benchmarking groups which we belong to, such as the Local Councils Roads Innovations Group (LCRIG), Midlands Service Improvement Group), Midlands Highways Alliance (MHA), Association for Public Service Excellence (APSE) and the National Highways and Transport (NHT) network.

We will also use *life cycle plans* for each asset group to identify areas for repair, maintenance and improvement and use these to guide our maintenance strategy and financial planning for the short term as well as the long term. In particular, this will seek to address current data gaps.

In terms of the prioritisation process, we will move to a more outcome based approach that also considers cross-asset costs and benefits as well as the impact on communities and the economy. The prioritisation process will also be improved through ongoing engagement with innovation opportunities and the sharing and implementation of good practice.

Asset-specific improvements

- cycleways
 - establish the extent of the cycleway network, including hierarchy (e.g. commuter routes)
 - identify and collect necessary inventory data
 - implement appropriate condition survey for cycleways
 - produce lifecycle plan for cycleways
- footways
 - complete footway condition survey
 - produce lifecycle plan for footways (using the *HMEP Footway Lifecycle Planning Toolkit* or otherwise)

- drainage
 - continuation of the programme of surveys and investigations to establish the extent, nature and condition of Oxfordshire’s highway drainage network and associated assets
 - development of an appropriate estimate(s) of service life of the various components of the drainage system to support lifecycle planning
- embankments
 - establishment of a capital funding programme for delivery of works to mitigate the risks currently posed by the condition of embankments on the network
- safety barriers
 - implementation of recommendations of the recent study on safety barriers on the network, i.e.:
 - ensure asset inventory is complete, current and that appropriate attributes are collected
 - use the *HMEP Ancillary Asset Lifecycle Planning Toolkit* to develop predictive models to support lifecycle planning
 - Develop three to five year forward works programmes
 - The policy for will be reviewed for alignment with *Well managed highway infrastructure: A Code of Practice*.

6 Five-Year Work Programmes

The proposed 5-year programme set out below shows investment for different activity including identification of specific schemes over the next two years for the larger maintenance schemes. These will be incorporated into the Capital Programme 2019/20 – 2029/30 which will be approved by Council in February 2020.

		TOTAL	£30,646,510	£29,301,191	£28,252,302	£32,552,500	£18,064,120
Programme Group	Project	Current Stage	2020/21	2021/22	2022/23	2023/24	2024/25
Carriageways	Major Resurfacing Schemes	2	£2,020,000	£1,875,000	£1,875,000	£2,955,000	
Carriageways	Resurfacing Schemes	2	£2,875,500	£2,875,500	£2,875,500	£3,875,500	£2,875,500
Carriageways	Edge Strengthening Schemes	2	£400,000	£400,000	£400,000	£400,000	£200,000
Carriageways	Overlay Schemes	2	£200,000	£200,000	£300,000	£400,000	£200,000
Carriageways	Recycling Schemes	2	£312,000	£375,000	£450,322	£500,000	£300,000
Carriageways	Combined Safety Schemes	2	£1,350,500	£1,350,000	£1,350,000	£1,350,000	£1,350,000
Carriageways	Advance Design/Site Investigation	1	£451,637	£523,455	£777,357		
Carriageways	Material and method innovation	0	£300,000	£300,000	£300,000	£300,000	£300,000
Surface Treatments	Surface Dressing	2	£3,255,949	£3,005,949	£2,755,949	£2,527,620	£1,927,620
Surface Treatments	Iron work strengthening programme	2	£200,000	£200,000	£200,000	£200,000	£90,000
Surface Treatments	Preventative repair programme (dragon patching treatment)	2	£1,300,000	£1,300,000	£1,300,000	£1,300,000	£380,000
Surface Treatments	Micro Asphalt Programme	2	£757,100	£838,100	£919,100	£1,000,100	£276,100
Surface Treatments	Retexturing Programme	2	£137,900	£137,900	£137,900	£137,900	£137,900
Structural Highway Improvements	Surface Dressing Pre-Patching Schemes	2	£975,000	£900,000	£825,000	£842,540	£400,000
Structural Highway Improvements	Structural Patching	2	£3,205,849	£2,930,307	£2,360,041	£2,506,940	£1,800,000
Structural Highway Improvements	Minor Patching	2	£4,230,000	£3,097,500	£1,965,000	£1,965,000	£550,000
Footway and Cycleway Works	Footway and Cycleway Programme	2	£750,000	£750,000	£900,000	£1,000,000	£750,000
Drainage	Drainage Programme	2	£1,450,000	£1,450,000	£1,800,000	£1,800,000	£1,100,000
Bridges	Structures Programme	2	£2,300,000	£2,300,000	£3,100,000	£5,000,000	£2,300,000
Public Rights of Way Foot Bridges	PROW Programme	2	£225,000	£225,000	£300,000	£350,000	£100,000
Electrical	Street Lighting Programme	2	£979,000	£775,000	£775,000	£775,000	£775,000
Electrical	Traffic Signals Programme	2	£533,074	£533,074	£552,000	£652,000	£552,000
Safety Fences	Safety Fence Renewal	2			£75,000	£750,000	
City Contribution (Section 42 & 101)	City Contribution	2	£1,700,000	£1,700,000	£1,700,000	£1,700,000	£1,700,000
Minor Works	Parish Support Programme	2	£230,000	£230,000	£230,000	£230,000	
Major Projects	Kennington Railway Bridge (previous commitment / assumption)	1	£500,000				
Major Projects	Tetsworth	1	£8,000	£1,000,000			

		TOTAL	£31,105,404	£18,603,008	£23,768,762	£23,408,251	£3,000,000
Programme Group	Project	Current Stage	2020/21	2021/22	2022/23	2023/24	2024/25
Major Projects	Kennington Railway Bridge (new funding)	1	£4,051,851	£12,329,008	£17,768,762	£17,408,251	£1,442,112
Major Projects	Street Lighting LED replacement	2	£9,000,000	£9,000,000	£12,000,000	£3,168,000	
Major Projects	Drayton Depot (EA permit)	0	£1,000,000				
Major Projects	Network Rail Electrification Bridge Betterment Programme	2	£250,000	£250,000	£500,000	£600,000	
Integrated Transport	Accessibility, Health & Road Safety Schemes	1	£5,051,851	£2,000,000	£2,000,000	£2,000,000	£2,000,000
Integrated Transport	Bus Journey time reliability	1	£1,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Local Growth Fund	Oxford, Rising Bollards	2	£221,000				
Local Growth Fund	Old Greyfriars School signal change	2	£15,000				
Minor Projects	Small schemes (developer and other funded)	2	£412,000	£274,000	tbc	tbc	tbc
New Inclusions			£11,103,702	£15,329,008	£20,768,762	£20,408,251	£4,442,112

Treasury Management Strategy Statement & Annual Investment Strategy for 2020/21

Background

1. The Local Government Act 2003 and supporting regulations require the Council to 'have regard to' the Prudential Code and to set Prudential Indicators for the next three years to ensure that the Council's capital investment plans are affordable, prudent and sustainable.
2. The Act requires the Council to set out its treasury strategy for borrowing and to prepare an Annual Investment Strategy (as required by Investment Guidance issued subsequent to the Act). The Annual Investment Strategy sets out the Council's policies for managing its investments and for giving priority to the security and liquidity of those investments.
3. Treasury management is defined as: "The management of the local authority's investments and cash flows, its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks."
4. The proposed strategy for 2020/21 is based upon the views of the Council's Treasury Management Strategy Team (TMST)¹, informed by market forecasts provided by the Council's treasury advisor, Arlingclose Limited.
5. It is proposed that any further changes required to the Annual Treasury Management Strategy & Annual Investment Strategy, continue to be delegated to the Director of Finance in consultation with the Leader of the Council and Cabinet Member for Finance.

Treasury Limits for 2020/21 to 2023/24

6. The Authorised Borrowing Limit requires the Council to ensure that total capital investment remains within sustainable limits and that the impact upon future council tax levels is 'acceptable'.
7. The capital investment relevant to this indicator to be considered for inclusion incorporates financing by both external borrowing and other forms of liability, such as credit arrangements. The Authorised Limit is to be set, on a rolling basis, for the forthcoming financial year and two successive financial years.

¹Comprising the Director of Finance, Service Manager (Pensions), Head of Corporate Finance and Treasury Manager.

Forecast Treasury Portfolio Position

8. The Council's treasury forecast portfolio position for the 2020/21 financial year comprises:

	Principal £m	Average Rate %
Opening External Debt Balance		
PWLB	291.383	4.493
LOBO	45.000	3.943
Money Market Loans	5.000	3.950
TOTAL EXTERNAL DEBT	341.383	
2019/20 <u>Average Cash Balance</u>		
Average In-House Cash	294.775	
Average Externally Managed	101.006	
TOTAL INVESTMENTS	395.781	

9. The average forecast cash balance for 2020/21 is comprised of the following:

	Average Balance £m
Earmarked Reserves	68.000
Capital and Developer Contributions	174.012
General Balances	28.000
Cashflow and Working Capital Adjustments	110.188
Provisions and Deferred Income	15.581
TOTAL	395.781

Prospects for Interest Rates

Economic Background – Provided by Arlingclose

10. The Bank of England maintained Bank Rate to 0.75% in November following a 7-2 vote by the Monetary Policy Committee. Despite keeping rates on hold, MPC members did confirm that if Brexit uncertainty drags on or global growth fails to recover, they are prepared to cut interest rates as required. Moreover, the downward revisions to some of the growth projections in the Monetary Policy Report suggest the Committee may now be less convinced of the need to increase rates even if there is a Brexit deal.
11. Growth in Europe remains soft, driven by a weakening German economy which saw GDP fall -0.1% in Q2 and is expected to slip into a technical recession in Q3. Euro zone inflation was 0.8% year on year in September, well below the European Central Bank's target of 'below, but close to 2%' and leading to the central bank holding its main interest rate at 0% while cutting the deposit facility rate to -0.5%. In addition to maintaining interest rates at ultra-low levels, the ECB announced it would recommence its quantitative easing programme from November.

12. In the US, the Federal Reserve began easing monetary policy again in 2019 as a pre-emptive strike against slowing global and US economic growth on the back of the ongoing trade war with China. At its last meeting the Fed cut rates to the range of 1.50-1.75% and financial markets expect further loosening of monetary policy in 2020. US GDP growth slowed to 1.9% annualised in Q3 from 2.0% in Q2.

Credit outlook – Provided by Arlingclose:

13. Credit conditions for larger UK banks have remained relatively benign over the past year. There remains some concern over a global economic slowdown, this has yet to manifest in any credit issues for banks. Meanwhile, the post financial crisis banking reform is now largely complete, with the new ringfenced banks embedded in the market.
14. Looking forward, the potential for a “no-deal” Brexit and/or a global recession remain the major risks facing banks and building societies in 2020/21 and a cautious approach to bank deposits remains advisable.

Interest rate forecast – Provided by Arlingclose:

15. Arlingclose is forecasting that Bank Rate will remain at 0.75% until the end of 2022. The risks to this forecast are deemed to be significantly weighted to the downside. The Bank of England, having previously indicated interest rates may need to rise if a Brexit agreement was reached, stated in its November Monetary Policy Report and its Bank Rate decision (7-2 vote to hold rates) that the MPC now believe this is less likely even in the event of a deal.
16. Gilt yields have risen but remain at low levels and only some very modest upward movement from current levels are expected based on Arlingclose’s interest rate projections. The central case is for 10-year and 20-year gilt yields to rise to around 1.00% and 1.40% respectively over the time horizon, with broadly balanced risks to both the upside and downside. However, short-term volatility arising from both economic and political events over the period is a near certainty.

Treasury Management Strategy Team’s View

17. The Council’s TMST, taking into account the advice from Arlingclose, market implications and the current economic outlook, have determined the rates to be included in the Strategic Measures budget for 2020/21 and over the medium term. TMST forecast no change in base rate over the medium term. The Bank Rate forecasts set out below represent the average rate for the financial year:

- 2020/21 0.75%
- 2021/22 0.75%
- 2022/23 0.75%
- 2023/24 0.75%

18. The TMST team has agreed that based on the current portfolio of deposits and market rates, the target in-house rate of return as set out below. These rates have been incorporated into the strategic measures budget estimates:

- 2020/21 0.85%
- 2021/22 0.75%
- 2022/23 0.75%
- 2023/24 0.75%

19. The Treasury Management Strategy Team continues to monitor the risks relating to Brexit.

Borrowing Strategy

20. It is expected that the Bank Rate will remain at 0.75% during 2020/21 and that there will continue to be a high “cost of carry²” associated with the long-term borrowing compared to temporary investment returns. The TMST will continue to monitor the Council’s debt portfolio and will consider debt repayment if it is in the Council’s interest.

21. The Council only needs to borrow to finance prudential borrowing schemes. The Council’s Capital Programme Financing Principles applies capital grants, developer contributions, capital receipts and revenue contributions to fund capital expenditure before using prudential borrowing. This means that the majority of the current capital programme is fully funded without the need to take up any new borrowing.

22. Financing the Council’s borrowing requirement internally would reduce the cost of carry in the short term but there is a risk that the internal borrowing would need to be refinanced with external borrowing at a time when PWLB (or its successor) and market rates exceed those currently available

23. The Council’s TMST have agreed that they should maintain the option to fund new or replacement borrowing up to the value of £100m of the portfolio through internal borrowing. Internal borrowing will have the effect of reducing some of the “cost of carry” of funding. Internal borrowing will also be used to finance prudential schemes.

24. If market conditions change unexpectedly during the 2020/21 financial year such that the policy to borrow internally is no longer in the short term or long-term interests of the Council, the TMST will review the borrowing strategy and report any changes to Cabinet.

25. As the Accountable Body for OxLEP Ltd, the Council will be required to prudentially borrow £41m on their behalf for project funding from 2020/21 onwards. The loans will be repaid through the retained business rates of the enterprise zone. The

² The difference between the interest payable on borrowing on debt and the interest receivable from investing surplus cash.

TMST monitor interest rates and will consider forward borrowing on behalf of OxLEP at the end of 2019/20 if it is determined to be cost-effective.

26. The Council will be able to apply for the new Local Infrastructure Rate, at a discounted interest rate of gilts + 60 basis points. The borrowing on behalf of OxLEP may be eligible as the schemes are all major infrastructure schemes.
27. The Council's chief objective when borrowing money is to strike an appropriate balance between securing low interest costs and achieving cost certainty over the period for which funds are required. The flexibility to renegotiate loans should the Authority's long-term plans change is a secondary objective.
28. The approved sources of long-term and short-term borrowing are:
 - Public Works Loan Board and any successor body
 - UK local authorities
 - any institution approved for investments (see below)
 - any other bank or building society authorised by the Prudential Regulation Authority to operate in the UK
 - UK public and private sector pension funds
 - capital market bond investors
 - special purpose companies created to enable joint local authority bond issues.

Borrowing for the Capital Financing Requirement

29. The Council's Capital Financing Requirement (CFR) represents the Council's underlying need to finance capital expenditure by borrowing. The Council's CFR is currently forecast to increase over the medium term financial plan. This is a result of the requirement to borrow on behalf of the OxLEP discussed in paragraph 26 and increased investment in the Council's Capital Programme, and the previously agreed £120m infrastructure investment.
30. The Council's external debt is also forecast to increase over the medium term financial plan as new external borrowing required for OxLEP projects and the infrastructure investment is forecast to exceed the rate at which existing long term debt is repaid upon maturity.

Borrowing Instruments

31. The main source of borrowing for the Council is the PWLB. The borrowing rate from the PWLB is directly linked to UK Government Gilt yield. There are three rates offered by the PWLB; the standard rate, the certainty rate and local infrastructure rate, which are 200, 180 and 60 basis points over gilts, respectively.
32. In October 2019, the PWLB increased the standard and certainty rates from 100 and 80 basis points to 200 and 180 basis points.
33. The Council will apply to qualify for the certainty rate and infrastructure rate each year as appropriate.

34. The TMST forecast for available rates from the PWLB over the medium term are as follows:
- 3.10 – 3.20% for the Certainty rate
 - 1.90 – 2.00% for the Infrastructure rate
35. The Council has historically set a maximum limit of 20% of the debt portfolio to be borrowed in the form of Lender’s Option Borrower’s Option (LOBOs). It is recommended that this remain as the limit for 2020/21. As at 30 November 2019, LOBOs represent 14.06% of the total external debt.
36. The Council has five £5m LOBO’s with call options in 2020/21, three of which have two call options in year, whilst two have a single call option in year. At each call date, the lender may choose to exercise their option to change the interest rate payable on the loan. If the lender chooses to do so, the Council will evaluate alternative financing options before deciding whether or not to exercise the borrower’s option to repay the loan or to accept the new rate offered. It is likely that if the rate is changed the debt will be repaid. The TMST is also exploring early repayment of LOBO’s where there is a financial benefit to do so.
37. Other sources of funding be available to the Council include the money market, other Local Authorities and the Municipal Bond Fund. The TMST will consider all available funding sources when entering into any new borrowing arrangements.

Arlingclose’s View on borrowing rates

38. Arlingclose have forecast gilt yields and borrowing rates over the medium term to be as follows:

Duration	Gilt Yield %	PWLB Infrastructure Rate %	PWLB Certainty Rate %
50 year	1.20 – 1.40	1.80 – 2.00	3.00 – 3.20
20 year	1.20 – 1.40	1.80 – 2.00	3.00 – 3.20
10 year	0.75 – 1.00	1.35 – 1.60	2.55 – 2.80
5 year	0.50 – 0.60	1.10 – 1.20	2.30 – 2.40

39. Arlingclose’s forecasts have an upside variation range of between 30 and 45 basis points, and a downside variation range of between 40 and 60 basis points depending on the economic and political climate.

Treasury Management Prudential Indicators for Debt

Gross and Net Debt

40. This indicator is intended to identify where an authority may be borrowing in advance of need.

Upper Limit of net debt:	2019/20	2020/21	2021/22	2022/23	2023/24
Net Debt / Gross Debt	70%	70%	70%	70%	70%

Upper and lower limits to maturity structure of fixed rate borrowing

41. This indicator highlights the existence of any large concentrations of fixed rate debt needing to be replaced at times of uncertainty over interest rates and is designed to protect against excessive exposures to interest rate changes in any one period, in particular in the course of the next ten years.
42. It is calculated as the amount of projected borrowing that is fixed rate maturing in each period as a percentage of total projected borrowing that is fixed rate. The maturity of borrowing is determined by reference to the earliest date on which the lender can require payment.
43. LOBOs are classified as maturing on the next call date, this being the earliest date that the lender can require repayment.

Maturity structure of fixed rate borrowing during 2018/19	Lower Limit %	Upper Limit %
Under 12 months	0	20
12 months and within 24 months	0	25
24 months and within 5 years	0	35
5 years and within 10 years	5	40
10 years and above	40	95

Annual Investment Strategy

44. The Council complies with all relevant treasury management regulations, codes of practice and guidance. The Council's investment priorities are: -
- The security of capital and
 - The liquidity of its investments
45. The Council also aims to achieve the optimum return on its investments commensurate with proper levels of security and liquidity. The borrowing of monies purely to invest or on-lend and make a return is unlawful and the Council will not engage in such activity.
46. The Treasury Management Code of Practice requires the Council to approve a Treasury Management Policy Statement. Good practice requires that this statement is regularly reviewed and revised as appropriate. Council approved the statement in February 2019. The statement has been reviewed and there are no revisions proposed.

Investment Instruments

47. Investment instruments identified for use in the 2020/21 financial year are set out in the Specified and Non Specified instrument tables below
48. Guidance states that specified investments are those requiring "minimal procedural formalities". The placing of cash on deposit with banks and building societies 'awarded high credit ratings by a credit rating agency', the use of Money

Market Funds (MMFs) and investments with the UK Government and local authorities qualify as falling under this phrase as they form a normal part of day to day treasury management.

49. Money market funds (MMFs) will be utilised, but good treasury management practice prevails and whilst MMFs provide good diversification the council will also seek to diversify any exposure by using more than one MMF where practical. It should be noted that while exposure will be limited, the use of MMFs does give the council exposure to institutions that may not be included on the approved lending list for direct deposits. This is deemed to be an acceptable risk due to the benefits of diversification. The Treasury team use an online portal to provide details of underlying holdings in MMFs. This enables more effective and regular monitoring of full counterparty risk.
50. All specified investments will be sterling denominated, with maturities up to a maximum of 1 year, meeting the 'high' credit rating criteria where applicable.
51. Non-specified investment products are those which take on greater risk. They are subject to greater scrutiny and should therefore be subject to more rigorous justification and agreement of their use in the Annual Investment Strategy; this applies regardless of whether they are under one-year investments and have high credit ratings.
52. A maximum of 50% of internal investments, and 100% of external investments will be held in non-specified investments.

Annex 3 – Appendix F

Specified Investment Instrument	Minimum Credit Criteria	Use
Term Deposits – UK Government	N/A	In-house
Term Deposits – other Local Authorities	N/A	In-house
Debt Management Agency Deposit Facility	N/A	In-house and Fund Managers
Treasury Bills	N/A	In-house and Fund Managers
UK Government Gilts	N/A	In-house on a buy and hold basis and Fund Managers
Term Deposits – Banks and Building Societies	Short-term F1, Long-term BBB+, Minimum Sovereign Rating AA+	In-house and Fund Managers
Certificates of Deposit issued by Banks and Building Societies	A1 or P1	In-house on a buy and hold basis and Fund Managers
Money Market Funds	AAA	In-house and Fund Managers
Other Money Market Funds and Collective Investment Schemes ³	Minimum equivalent credit rating of A+. These funds do not have short-term or support ratings.	In-house and Fund Managers
Reverse Repurchase Agreements - maturity under 1 year from arrangement and counterparty is of high credit quality (not collateral)	Long Term Counterparty Rating A-	In-house and Fund Managers
Covered Bonds – maturity under 1 year from arrangement	Minimum issue rating of A-	In-house and Fund Managers

³ I.e., credit rated funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573.

Non Specified Investment Instrument	Minimum Credit Criteria	Use	Max Maturity Period	Non Specified Investment Instrument
Term Deposits – other Local Authorities (maturities in excess of 1 year)	N/A	In-house	5 years	Term Deposits – other Local Authorities (maturities in excess of 1 year)
UK Government Gilts with maturities in excess of 1 year	N/A	In-house and Fund Managers	5 years in-house, 10 years fund managers	UK Government Gilts with maturities in excess of 1 year
Collective Investment Schemes ⁴ but which are not credit rated	N/A	In-house and Fund Managers	Pooled Funds do not have a defined maturity date	Collective Investment Schemes ⁵ but which are not credit rated
Registered Providers	As agreed by TMST in consultation with the Leader and the Cabinet Member for Finance	In-house	5 years	Registered Providers
Term Deposits – Banks and Building Societies (maturities in excess of 1 year)	Short-term F1+, Long-term AA-	In-house and Fund Managers	3 years	Term Deposits – Banks and Building Societies (maturities in excess of 1 year)
Structured Products (e.g. Callable deposits, range accruals, snowballs, escalators etc.)	Short-term F1+, Long-term AA-	In-house and Fund Managers	3 years	Structured Products (e.g. Callable deposits, range accruals, snowballs, escalators etc.)
Bonds issued by Multilateral Development Banks	AAA	In-house and Fund Managers	25 years	Bonds issued by Multilateral Development Banks

⁴ Pooled funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573.

⁵ Pooled funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573.

Non Specified Investment Instrument	Minimum Credit Criteria	Use	Max Maturity Period	Non Specified Investment Instrument
Bonds issued by a financial institution which is guaranteed by the UK Government	AA	In-house and Fund Managers	5 years in-house	Bonds issued by a financial institution which is guaranteed by the UK Government
Sovereign Bond Issues	AAA	In-house on a buy and hold basis. Fund Managers	5 year in-house, 30 years fund managers	Sovereign Bond Issues
Reverse Repurchase Agreements - maturity in excess of 1 year, or/and counterparty not of high credit quality.	Minimum long term rating of A-	In-house and Fund Managers	3 years	Reverse Repurchase Agreements - maturity in excess of 1 year, or/and counterparty not of high credit quality.
Covered Bonds	AAA	In-house and Fund Managers	20 years	Covered Bonds

Changes to Instruments

53. With the prospect of interest rate remaining low for the medium term, and with an increase in peer to peer lending rates amongst Local Authorities, it is proposed to increase the duration for deposits with other Local Authorities to 5 years (from 3 years)

Credit Quality

54. The CIPFA Code of Practice on Treasury Management (2017) recommends that Councils have regard to the ratings issued by the three major credit rating agencies (Fitch, Moody's and Standard & Poor's) and to make decisions based on all ratings. Whilst the Council will have regard to the ratings provided by all three ratings agencies, the Council uses Fitch ratings as the basis by which to set its minimum credit criteria for deposits and to derive its maximum counterparty limits. Counterparty limits and maturity limits are derived from the credit rating matrix as set out in the tables at paragraphs 64 and 65 respectively.
55. The TMST may further reduce the derived limits due to the ratings provided by Moody's and Standard & Poor's or as a result of monitoring additional indicators such as Credit Default Swap rates, share prices, Ratings Watch & Outlook notices from credit rating agencies and quality Financial Media sources.

56. Notification of any rating changes (or ratings watch and outlook notifications) by all three ratings agencies are monitored daily by a member of the Treasury Management Team. Updates are also provided by the Council's Treasury Management advisors Arlingclose and reported to TMST. Appropriate action will be taken for any change in rating.
57. Where a change in the Fitch credit rating places a counterparty on the approved lending list outside the credit matrix (as set out in tables at paragraphs 65 and 66), that counterparty will be immediately removed from the lending list.
58. The Authority defines "high credit quality" organisations as those having a credit rating of A- or higher that are domiciled in the UK or a foreign country with a sovereign rating of AA+ or higher with the Fitch ratings agency.

Liquidity Management

59. The Council forecasts its cash flow to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a pessimistic basis, with receipts under-estimated and payments over-estimated to minimise the risk of the Council being forced to borrow on unfavourable terms to meet its financial commitments. Limits on long-term investments are set by reference to the Council's medium term financial plan and cash flow forecast. The Council uses instant access bank deposit accounts and money market funds for balances forecast to be required at short notice to meet commitments due. The TMST will continue to monitor options available to maintain the required liquidity, and will open new accounts with approved counterparties as appropriate.

Lending Limits

60. In addition to the limits determined by the credit quality of institutions, the TMST apply further limits to mitigate risk by diversification. These include:
 - Limiting the amount lent to banks in any one country (excluding the UK) to a maximum of 20% of the investment portfolio.
 - Limiting the amount lent to any bank, or banks within the same group structure to 10% of the investment portfolio.
 - Actively seeking to reduce exposure to banks with bail in risk
61. Where the Council has deposits on instant access, this balance may temporarily exceed the 10% bank or group limit. However, the limits as set out in paragraphs 65 and 66 will still apply.
62. Counterparty limits as set out in paragraphs 65 and 66, may be temporarily exceeded by the accrual and application of interest amounts onto accounts such as call accounts, money market funds or notice accounts. Where the application of interest causes the balance with a counterparty to exceed the agreed limits, the balance will be reduced when appropriate, dependent upon the terms and conditions of the account and cashflow forecast.

63. Any changes to the approved lending list will be reported to Cabinet as part of the Financial Monitoring and Business Strategy Delivery Report.
64. The Council also manages its credit risk by setting counterparty limits. The matrix below sets out the maximum proposed limits for 2020/21. The TMST may further restrict lending limits dependent upon prevailing market conditions. BBB+ to BBB- ratings is included for overnight balances with the Council's bank, currently Lloyds Bank Plc. This is for practical purposes should the bank be downgraded.

LENDING LIMITS - Fitch Rating	Short Term Rating	
	F1+	F1
Long Term Rating	F1+	F1
AAA	£30m	£20m
AA+	£30m	£20m
AA	£25m	£15m
AA-	£25m	£15m
A+	£20m	£15m
A	£20m	£15m
A-	£15m	£10m
BBB+, BBB, BBB- (bank with which the Council has its bank account)	£20m	£20m

65. The Council also manages its counterparty risk by setting maturity limits on deposits, restricting longer term lending to the very highest rated counterparties. The table below sets out the maximum approved limits. The TMST may further restrict lending criteria in response to changing market conditions.

MATURITY LIMITS – Fitch Rating	Short Term Rating	
	F1+	F1
Long Term Rating	F1+	F1
AAA	3 years	364 days
AA+	2 years	364 days
AA	2 years	9 months
AA-	2 years	9 months
A+	364 days	9 months
A	9 months	6 months
A-	6 months	3 months
BBB+, BBB, BBB- (bank with which the Council has its bank account)	Overnight	Overnight

Structured Products

66. As at 30 November 2019, the Council had no structured products within its investment portfolio. Structured products involve varying degrees of additional risk over fixed rate deposits, with the potential for higher returns. It is recommended that the authority maintain the option to use structured products up to a maximum of 10% of the investment portfolio. The Council will continue to monitor structured products and consider restructuring opportunities as appropriate.

External Funds

67. The Council uses external fund managers and pooled funds to diversify the investment portfolio through the use of different investment instruments, investment in different markets, and exposure to a range of counterparties. It is expected that these funds should outperform the Council's in-house investment performance over a rolling three-year period. The Council will have no more than 50% of the total portfolio invested with external fund managers and pooled funds (excluding MMFs). This allows the Council to achieve diversification while limiting the exposure to funds with a variable net asset value. And, in order to ensure appropriate diversification within externally managed and pooled funds these should be diversified between a minimum of two asset classes.
68. As at 30 November 2019, the Council had £101m invested in external funds (excluding MMFs), representing 21% of the Council's total investment portfolio.
69. The external funds have a higher targeted income return than in house deposits of 3.75% which has been incorporated into the medium term financial plan.
70. The performance of the pooled funds is monitored by the TMST throughout the year against the funds' benchmarks and the in-house investment returns. The TMST will keep the external fund investments under review and consider alternative instruments and fund structures, to manage overall portfolio risk. It is recommended that authority to withdraw, or advance additional funds to/from external fund managers, continue to be delegated to the TMST.

Investment Approach

71. The TMST will aim to maintain the balance between medium and long term deposits with local authorities and short-term secured and unsecured deposits with high credit quality financial institutions. Money Market Funds will continue to be utilised for instant access cash. This approach will maintain a degree of certainty about the investment returns for a proportion of the portfolio, while also enabling the Treasury Management team to respond to any increases in interest rates in the short-term.

Treasury Management Indicators for Investments

Upper limit to total of principal sums invested longer than 364 days

72. The purpose of this limit is to contain exposure to the risk of loss that may arise as a result of the Authority having to seek early repayment of the sums invested.
73. During 2019/20 the limit for longer term lending was increased from £150 to £180m to reflect the higher than forecast cash balances and to take advantage of high peer to peer lending rates. Cash balances were higher than forecast due to higher levels of Developer Contributions and slippage in the capital programme. It is proposed to increase this limit to £200m for 2020/21, then reduce back down to £150m by 2023/24 as the average forecast balance reduces.

	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m
Upper limit on principal sums invested longer than 364 days	200	170	155	150

Upper limits on fixed and variable rate interest exposures

74. These indicators allow the Authority to manage the extent to which it is exposed to changes in interest rates.

Fixed interest rate exposure

75. Limits in the table below have been set to reflect the current low interest rate environment. The limits set out offer the Council protection in an uncertain interest rate environment by allowing the majority of the debt portfolio to be held at fixed interest rates, thus not subjecting the Council to rising debt interest.

Upper limit for fixed interest rate exposure	2019/20	2020/21	2021/22	2022/23	2023/24
Net principal re fixed rate borrowing / investments	£350m	£350m	£350m	£350m	£350m

76. Fixed rate investments and borrowings are those where the rate of interest is fixed for at least 12 months, measured from the start of the financial year or the transaction date if later. All other instruments are classed as variable rate.

Variable interest rate exposure

77. The council will maintain a zero (or negative) net variable interest rate exposure. This is maintained by insuring the Council's variable rate debt is lower than variable rate investments

78. Prudential Indicators are reported to and monitored by the TMST on a regular basis and will be reported to the Audit & Governance Committee and Cabinet in the Treasury Management Outturn Report 2019/20 and the Treasury Management Mid-Term Review 2020/21, which will be considered in July and November 2020 respectively.

Policy on Use of Financial Derivatives

79. The Council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the Council is exposed to. Additional risks presented, such as credit exposure to derivative counterparties, will be taken into account when determining the overall level of risk. Embedded derivatives will not be subject to this policy, although the risks they present will be managed in line with the overall treasury risk management strategy.

80. Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria. The current value of any amount due from a

derivative counterparty will count against the counterparty credit limit and the relevant foreign country limit.

81. It is the view of the TMST that the use of standalone financial derivatives will not be required for Treasury Management purposes during 2020/21. The Council will only use derivatives after seeking expertise, a legal opinion and ensuring officers have the appropriate training for their use.

Performance Monitoring

82. The Council will monitor its Treasury Management performance against other authorities through its membership of the CIPFA Treasury Management benchmarking club.
83. Arlingclose benchmark the performance of their clients against each other on a quarterly basis, looking at a variety of indicators including investment risk and returns.
84. The Council will benchmark its internal return against the 3 month London Interbank Bid Rate (LIBID) - the rate at which banks are willing to borrow from other banks.
85. Latest performance figures will be reported to the Audit & Governance Committee and Cabinet in the Treasury Management Outturn Report 2019/20, and the Treasury Management Mid-Term Review 2020/21, which will be considered in July and November 2020 respectively.

Investment Training

86. All members of the Treasury Management Strategy Team are members of CIPFA or other professional accounting body. In addition, key Treasury Management officers receive in-house and externally provided training as deemed appropriate and training needs are regularly reviewed, including as part of the staff appraisal process.
87. The Council has opted up to 'professional client' categorisation with under the second Markets in Financial Instruments Directive (MiFID II). In order to achieve this, evidence was required that the person(s) authorised to make investment decisions on behalf of the authority have at least one year's relevant professional experience and the expertise and knowledge to make investment decisions and understand the risks involved. Members of the TMST currently meet these criteria and training needs will be regularly monitored and reviewed to ensure continued compliance.

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Division(s): All

Cabinet – 21 JANUARY 2020

BUSINESS MANAGEMENT & MONITORING REPORT

November 2019

Report by Corporate Director for Customers and Organisational Development
and Director of Finance

RECOMMENDATION

1. The Cabinet is **RECOMMENDED** to:
 - (a) note the contents of this report;
 - (b) note the virements set out in Annex C – 2b;
 - (c) approve the creation of a new Redundancy Reserve and approve the transfer of £1m from the Budget Priorities Reserve to the Redundancy Reserve as set out in Annex C.

Executive Summary

2. This report sets out Oxfordshire County Council's (OCC's) progress towards Corporate Plan priorities and provides an update on the delivery of the Medium-Term Financial Plan at the end of November 2019.

Introduction

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. This report sets out the Council's activities from 1–30 November 2019.
4. These monthly business management reports are part of a suite of performance and budget documents which set out our ambitions, priorities and financial performance. The Corporate Plan sets out the Council's ambitions for the next three years, under our vision for Thriving Communities. It also shows our priority activities for the current business year. An accompanying 'Outcomes Framework' sets out the way we measure progress towards those ambitions and priorities and forms the basis of the performance information included within this report.
5. Our Corporate Plan, Medium Term Financial Plan, Outcomes Framework and previous business management reports, can be found on the Council's website.¹

¹ Corporate Plan and Medium Term Financial Plan: <https://www.oxfordshire.gov.uk/council/our-vision/corporate-plan>

Outcomes Framework and previous reports: <https://www.oxfordshire.gov.uk/council/about-your-council/plans-performance-and-policies/performance-reports>

6. This report summarises performance, risk and finance. This reflects the Council's commitment to transparency and improved performance management. Further information is provided in three annexes:
 - Annex A: performance
 - Annex B: risk
 - Annex C: finance
7. This report also helps to demonstrate some of the ways in which the Council is taking climate action for a thriving Oxfordshire. In April, councillors unanimously agreed to take greater action on carbon emissions, including an ambitious target to become carbon neutral by 2030 for our own estate and activities. This report shows progress towards our ambitions to reduce carbon emissions, improve transport networks and support healthy communities as part of our commitment to tackle the issue of climate change.

Progress towards delivery of Oxfordshire County Council's Corporate Plan

8. Oxfordshire County Council's vision for Oxfordshire has six priorities which show our ambitions for the county. Our Corporate Plan sets out 13 outcomes which describe the changes we expect to see as a result of the Council's actions.
9. 48 performance indicators show the extent to which the outcomes are being achieved – see Annex A. In turn, measures and targets show progress towards the indicators. Collectively, this arrangement of ambitions, and ways of measuring progress towards our ambitions, is called the Outcomes Framework.
10. The Outcomes Framework enables us to regularly assess and report on progress towards our ambitions. Every month, most outcomes and indicators are given a Red, Amber or Green (RAG) rating, signifying whether or not progress is on track. In deciding RAG ratings we consider data on current performance and an assessment of progress.
11. The exceptions are a small number of indicators and outcomes for which a performance target is not appropriate, but which are included in the Outcomes Framework because they help us to provide updates on activity in these important areas. These outcomes and indicators are not given a RAG rating but are shaded grey, and the measures which support them are marked as "no target set".
12. Each month we use snapshot tables (below) to indicate the main areas of change since the previous report. This month all but one of the indicators for which RAG assessments have been made are rated either Green or Amber. No additional outcomes are considered at risk of becoming Red in the next reporting period (December).
13. In this report there are three significant changes to highlight. Two changes follow our review of indicators and measures relating to children's education, which is a routine performance management activity at this point in the academic year. The third relates to ongoing work on transport connectivity:

- a. The indicator “Percentage of children at good schools / settings” has moved from Grey (not assessed) in October to Green in November. Measures supporting this indicator show the percentage of children attending primary or secondary schools rated Good or Outstanding by Ofsted. We have elected to set targets for these measures – that Oxfordshire should be in the top quartile nationally by the end of academic year 2019/20 – and rates at the end of Term 1 indicate that we are on track to meet those targets.
 - b. The indicator “Children missing education” was rated Amber in October’s report. We have assessed this indicator as Grey in November, signifying that performance in this area is not currently appropriate for assessment against targets. During term 1 of the academic year a session of absence carries disproportionate weight which reduces, and therefore becomes more meaningful, as the year progresses. We have set aspirations for the current academic year and expect to report a RAG rating for this indicator in April.
 - c. The indicator “level of transport connectivity” has been removed from the Outcomes Framework for 2019-20. This work remains a priority for the Council, and activities have been ongoing in support of this ambition throughout the year to date. However, it has not yet been possible to determine the correct performance measures for the purposes of monthly corporate reporting. A proposal is due to be worked up in partnership with bus operators as part of developing a shared vision and strategy for buses, and also to take into account outcomes of the Oxfordshire Rail Corridor Study, all of which will inform development of the Council’s updated Local Transport & Connectivity Plan. Performance measures will be developed for use in 2020-21, likely to be broken down into specific transport corridors and to include measures for (i) journey time and (ii) reliability / punctuality.
14. These changes mean that in November only the indicator “Number of people delayed leaving hospital awaiting social care” is assessed as Red. This indicator forms part of the overall Oxfordshire system performance on delayed transfers of care (DTC). The system performance has remained challenged, with contributing factors being the performance and effectiveness of reablement, the availability of home care and the recruitment and retention of care staff. We have been reviewing the performance across the Urgent Care System, with the leads for this work being allocated to the Director of Adult Social Services in conjunction with the Chief Nurse at Oxford University Hospitals Trust. They are confident that their focus on this area will start to show improvements in subsequent reports.
 15. The information below provides a snapshot of progress towards Corporate Plan outcomes in November 2019, including some of our performance highlights. A full account of progress towards our Corporate Plan priorities is at Annex A.



We listen to residents so we can continuously improve our services and provide value for money

Performance highlights

- The quality of our adult social care providers remains high. 91% of providers are rated good or outstanding. This compares with 84% nationally. No social care providers in Oxfordshire are rated inadequate.

PERFORMANCE SUMMARY			
OUTCOMES	INDICATORS	RAG	Change since last month
Residents feel engaged with the County Council	Number and value of opportunities for public engagement	Amber	No change
	Rates of customer satisfaction	Amber	No change
Our services improve and deliver value for money	Value for money through effective use of resources	Amber	No change
	Improvement following external inspection/audit	Green	No change
The use of our assets is maximised	Progress with One Public Estate Programme	Green	No change



We help people live safe and healthy lives and play an active part in their community

Performance highlights

- As part of our commitment to help people to live “safe and well” our Trading Standards team has introduced an additional 60 students to Young Friends Against Scams as an initiative to raise awareness about potential scams.
- We continue to perform above target for our emergency response activities.

PERFORMANCE SUMMARY			
OUTCOMES	INDICATORS	RAG	Change since last month
People are helped to live safe and healthy lives	Number of people helped to live “safe and well”	Green	No change
	Emergency response times	Green	No change
	Prevalence of healthy lifestyles	Green	No change
	Numbers of people receiving support for drug and alcohol dependency	Green	No change
	Proportion of people walking & cycling	Amber	No change
People play an active part in their communities	Rates of volunteering	n/a	No change
	Prevalence of services provided by communities	n/a	No change



We provide services that enhance the quality of life and protect the local environment

Performance highlights

- Measures supporting the “condition of highways” indicator show that we are performing well against targets for highway network condition, speed of repairs and responsiveness to public reporting of highway defects.
- Our performance against the indicator “proportion of household waste re-used, recycled or composted” remains strong. Additionally, Oxfordshire has just been named by the Department for Environment, Food and Rural Affairs the best performing county council waste disposal authority in England, for our recycling rates during 2017/18. This strong performance reflects our commitment to work with District Councils and residents to protect the environment.

PERFORMANCE SUMMARY			
OUTCOMES	INDICATORS	RAG	Change since last month
Our quality of life in Oxfordshire is enhanced	Condition of highways	Green	No change
	Funding secured through planning obligations	Green	No change
	Levels of public transport use	Green	No change
	Rates of access to cultural services	Green	No change
Our local environment is protected	Percentage of planning decisions on time	Amber	No change
	Levels of carbon emissions	Green	No change
	Levels of energy use	Green	No change
	Air quality	Amber	No change
	Proportion of household waste re-used, recycled or composted	Green	No change



We strive to give every child a good start in life and protect everyone from neglect

Performance highlights

- Early help services are meeting the needs of families and removing the need for escalation to social care. The reduction in child protection cases seen last year (15% drop compared to a 4% drop nationally) is continuing. This means fewer children in Oxfordshire are put through unnecessary child protection investigations than elsewhere.
- The number of requests for Education, Health and Care Plans continues to rise – a 35% increase on last year. Despite this, timeliness of assessments remained stable in the month, and higher than last year. A service redesign was implemented in August 2019, which identified additional staff posts to meet this demand. These are being recruited to and should be filled by the end of January 2020 to ensure that the service continues to improve.

Areas for improvement

- Social care caseloads are currently higher than target due to higher demand (particularly looked after children and Children in Need). As part of the introduction of our new Family Safeguarding Plus model, the Council is investing significant extra resource to increase the number of qualified social workers within the service. This will have the effect of reducing overall caseloads to provide more effective interventions.
- The number of looked after children remains higher than target but is in line with other authorities. The number has grown by 1% this year, compared with a 4% increase nationally last year. Introducing the Family Safeguarding Plus model will reduce the number of children becoming looked after through child protection concerns.

PERFORMANCE SUMMARY			
OUTCOMES	INDICATORS	RAG	Change since last month
Children are given a good start in life	Prevalence of healthy children	Amber	No change
	Sufficiency of early years places	Green	No change
	Number of looked after children	Amber	No change
	Numbers of children's social care assessments	Green	No change
	Number of children the subject of protection plans	Green	No change
	Number of children's cases held by permanent staff	Amber	No change
Children are able to achieve their potential	% of children with a place at their first preference school	n/a	No change
	Percentage of children at good schools / settings	Green	was Grey
	Children missing education	n/a	was Amber
	Levels of educational attainment	Green	No change
	Timeliness of completing Education, Health and Care Plans	Amber	No change



We enable older and disabled people to live independently and care for those in greatest need

Performance highlights

- In November an independent consultancy report by iMPower identified the Council as the 5th most productive council for older people in the country, and the 15th for all-age disability. This reflected in Oxfordshire:
 - the high quality of social care services as inspected by the Care Quality Commission
 - the high number of people who are offered equipment and alternative technologies to help them remain independent when they first approach the Council
 - our high use of direct payments, enabling people to choose the right care to meet their needs
 - that the rate of people saying, in the national annual user survey, that our services met their needs is higher than in the rest of the country
 - that more people are supported with long term care in their own home, as opposed to care homes, than in other areas

- o that more adults of a working age who have a disability are in employment.

Areas for improvement

- Delayed transfers of care remain high and the Oxfordshire system is currently rated 147th out of 149 upper tier and unitary councils. A review of activities associated with improvements is underway, overseen by the Urgent Care Group, and will be detailed in future reports.
- The Council's preferred pathway out of hospital for people who need care is via reablement. The service is currently performing below contract levels across the year. The future configuration of the reablement offer in line with changes to the broader homecare service is under way.
- To help people live at home we would wish to purchase more home care. At present, the market is constrained by the number of people wanting to work in the home care market. We are currently reviewing the way we commission home care to provide greater certainty for providers and hence help them recruit.

PERFORMANCE SUMMARY			
OUTCOMES	INDICATORS	RAG	Change since last month
Care services support independent living	Number of home care hours purchased	Amber	No change
	Number of hours of reablement delivered	Amber	No change
	Number of people with control over their care	Green	No change
	Number of people delayed leaving hospital awaiting social care	Red	No change
	Proportion of older people supported in the community	Amber	No change
Homes and places support independent living	Percentage of people living in safe and suitable housing	Green	No change



We support a thriving local economy by improving transport links to create jobs and homes for the future

Performance highlights

- We continue to perform well against our targets for enablement of access to digital services. We are at or very near target for the number of premises enabled to have access to superfast broadband in Oxfordshire, and for our target of reducing the percentage of premises without access to at least "basic broadband".

PERFORMANCE SUMMARY			
OUTCOMES	INDICATORS	RAG	Change since last month
Strong investment and infrastructure are secured	Level of investment attracted	Green	No change
	Level of infrastructure investment required	Green	No change
	Number of new homes	Amber	No change
	Levels of disruption to journeys	Amber	No change
	Level of access to online and digital services	Green	No change
Local businesses grow and provide employment	Employment rates	n/a	No change
	Business numbers	n/a	No change
	Numbers of apprenticeships	n/a	No change
	Levels of workforce	n/a	No change

Managing risk

16. The table below provides a summary of the Council’s “leadership risks”. Leadership risks are risks that are significant in size and duration and could impact on the performance of the Council as a whole, and in particular on its ability to deliver its strategic priorities. This may include operational risks escalated from particular services to the leadership level due to the potential scale of their impact.
17. There are no new or closed leadership risks to report this month. No risk’s score has changed since the previous report.
18. In this table, the “residual score” is the most significant. The residual score is our assessment of a risk’s likelihood and potential impact once all existing controls – such as existing management activities – have been taken into account. Higher scores indicate more significant risks.

Risk Ref	Risk Title	Inherent Risk Score	Residual Risk Score
LR1	Demand management	10	10
LR2	Safeguarding of vulnerable adults and children	15	10
LR3	Growth Deal	15	15
LR4	Local resilience, community resilience, cohesion	4	2
LR5	Management of partnerships (non-commercial)	8	6
LR6	Supply chain management	8	8
LR7	Delivery of statutory duties	12	4
LR8	Corporate governance	4	2
LR9	Workforce management	12	6
LR10	Organisational Change and Service Design	16	8
LR11	Financial resilience	15	10
LR12	Property and assets (maintenance cost)	12	8
LR13	Health and safety	12	8
LR14	Business continuity and recovery	6	4
LR15	Cyber security	16	12
LR16	ICT Infrastructure	12	8

19. The full Leadership Risk Register is attached in Annex B

Summary of the Council's financial position

20. Based on expenditure to the end of November 2019, there is a forecast directorate overspend of £3.6m. This is partly offset by a net underspend on Corporate Measures, including interest earned, of -£0.3m.

Directorate	Latest Budget 2019/20	Forecast Outturn 2019/20	Forecast Outturn Variance November 2019/20	Forecast Outturn Variance 2019/20	Forecast Outturn Variance October 2019/20
	£m	£m	£m	%	
Children's Services	118.1	121.2	+3.1	2.6%	+3.2
Adult Services	183.9	184.6	+0.7	0.3%	+0.6
Communities	113.3	113.3	0.0	0.0%	0.0
Resources	28.8	28.6	-0.2	-0.7%	-0.2
Total Directorate Position	444.1	447.7	+3.6	0.8%	+3.6
Strategic Measures	-444.1	-444.4	-0.3	-0.1%	-0.3
Overall Surplus/Deficit	0.0	3.3	+3.3		+3.3

21. 80% of planned savings totalling £36.8m are on track to be delivered in 2019/20. £5.1m of savings that are not expected to be achieved in year are reflected in the Directorate forecast outturn position. These will either be delivered in 2020/21, or where they can no longer be achieved, will be addressed as part of the Service & Resource Planning process for 2020/21.

22. See Annex C for further details and commentary.

CLAIRE TAYLOR

Corporate Director for Customers and
Organisational Development

LORNA BAXTER

Director of Finance

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ANNEX A – PERFORMANCE DASHBOARDS – to 30 NOVEMBER 2019

WE LISTEN TO RESIDENTS SO WE CAN CONTINUOUSLY IMPROVE OUR SERVICES AND PROVIDE VALUE FOR MONEY							
OUTCOME	INDICATOR	OUT-LOOK	MEASURE	TARGET	RATE / LEVEL	COMMENTARY	
Residents feel engaged with the County Council	Number and value of opportunities for public engagement	AMBER	↑	% of Residents' Survey respondents who say local people can influence us	Increase on 18-19 average	41% (Aug '19)	Summer '18 to Summer '19 average was 46.5%. The latest available figure (for August) is up from that previously reported (31% in May).
				% of Residents' Survey respondents who say we act on residents' concerns	Increase on 18-19 average	61% (Aug '19)	Summer '18 to Summer '19 average was 55%. The latest available figure (for August) is up from that previously reported (56% in May).
				To keep within the lower quartile of comparable authorities of upheld Local Government & Social Care Ombudsman complaints	Lower quartile	50% (Sept '19)	The Ombudsman's annual report (Sept 2019) showed that the Council is still the fifth lowest of all County Councils as regards the number of upheld complaints in the period April 2018 – March 2019.
	Rates of customer satisfaction	AMBER	↔	% of Residents' Survey respondents satisfied with the way we run things	>55%	51% (May 19)	Summer '18 to Summer '19 average was 34.5%. The latest available figure (for August) is up from that previously reported (48% in May).
Our services improve and deliver value for money	Value for money through effective use of resources	AMBER	↔	Achievement of planned savings	95%	80%	80% of the planned savings of £36.8m are expected to be delivered.
				General balance outturn at the risk assessed level	>=100%	113%	113% - The current forecast for general balances at 31 March 2020 is £21.8m. This is £2.5m higher than the risk assessed level of £19.3m as set out in the Medium Term Financial Plan (MTFP) approved by Council in February 2019.
				Unplanned use of earmarked reserves	< £250k	£2.8m	Reserves are forecast to be £68.2m at 31 March 2019. Cabinet are requested to approve a transfer of £1m from the Budget Priorities Reserve to a new Redundancy Reserve subject to the new reserve being approved. The projected spend of the Transformation Reserve has been reprofiled with £1.8m now being forecast to be spent in 2020/21 onwards.
				Total Directorate outturn variation	=< 1% variation	0.8%	Based on expenditure to the end of November 2019, there is a forecast directorate overspend of £3.6m . As agreed by Cabinet on 18 June 2019 this position includes the temporary virement of £2.2m from Corporate Contingency to Special Educational Needs Home to School Transport to ensure this budget reflects a reasonable baseline and allow time for savings to be implemented and costs to be reduced.
				Total outturn variation	0%	0.0%	£3.6m of the Corporate Contingency is currently unallocated. it may be possible to use this to offset the directorate forecast overspend of £3.6m. There is also an underspend of -£0.3m on Strategic Measures.
				Capital programme: average cost variation from Concept Design (Gate 1) to Practical Completion (Gate 3)	<=2%	0.0%	There are no cost variations to report this month.
	Improvement following external inspection/audit	GREEN	↔	Proportion of post-inspection/audit actions dealt with on time	100%	100%	We continue to work towards the agreed actions from the HM Inspector of Constabulary and Fire & Rescue Services action plan
				The proportion of social care providers rated as 'outstanding' or 'good' by the Care Quality Commission in Oxfordshire remains above the (monthly) national average	National average (84% Apr 19)	91%	91% of social care providers in Oxfordshire are rated 'good' or outstanding compared to 84% nationally. This is supported by robust commissioning and contract management arrangements in the Council
The use of our assets is maximised	Progress with One Public Estate Programme	GREEN	↔	One Public Estate projects progress in line with project plans	In line with individual project timescales	On track	One Public Estate (OPE) is a Government seed-funding programme incentivising local partners to consider opportunities for co-location and property asset rationalisation. Our OPE projects are progressing and a further two projects were recently approved by the Board. These will now progress into options appraisal with relevant stakeholders engaged.

Indicators marked as 'Grey' are those for which a performance target is not appropriate. They are included here so that we can provide updates on activity in these important areas.

WE HELP PEOPLE LIVE SAFE AND HEALTHY LIVES AND PLAY AN ACTIVE PART IN THEIR COMMUNITY						
OUTCOME	INDICATOR	OUT-LOOK	MEASURE	TARGET	RATE / LEVEL	COMMENTARY
People are helped to live safe and healthy lives	Number of people helped to live "safe and well"	↔	Number of vulnerable children and adults helped to live more secure and independent lives, supported by safe and well visits	4,107	6,015	Trading Standards team has continued to introduce Young Friends Against Scams, with 60 extra students pledged. The students were asked how they would spread awareness of scams and gave excellent responses. The team supported the Fire and Rescue Service at Woodstock Primary School's safety day involving 300 pupils working through various home safety issues.
			Number of children better educated to live safer and healthier lives	9,358	56,707	As we continue to over-achieve in the number of people who have been part of a fire prevention campaign, we are reviewing this measure to ensure we are setting the right measure and target. The largest contributor to this figure was our attendance at the Countryfile Live event in August.
	Emergency response times	↔	More people alive as a result of our prevention, protection and emergency response activities	708	507	Despite the low number of Co-responding calls (we ceased responding to these in Sept 2017 in all but one fire station) we are above target for the measure overall as Co responding is only one element of the measure.
			% of emergency call attendances made within 11 minutes	80%	90.96%	We continue to perform above target for our emergency response targets
			% of emergency call attendances made within 14 minutes	95%	97.45%	
	Prevalence of healthy lifestyles	↑	% of eligible population 40-74 who have been invited for NHS Health Check since Apr '15	89%	90.5%	Our second quarter targets have been exceeded. Quarter 3 (Oct-Dec). Data will be available 5th Feb 2020.
			% of eligible population 40-74 who have received a NHS Health Check since Apr '15	44.1%	44.6%	
	Numbers of people receiving support for drug and alcohol dependency	↔	Rate of successful quitters per 100,000 smokers 18+ (reported a quarter in arrears)	> 3468	3317	Although the currently reported figure shows 3,317, we expect an increase in activity in Q3 and Q4 which would correlate to patterns in previous years.
			Number of users of OPIATES that left drug treatment successfully (free of drug(s) of dependence) who do not then re-present to treatment again within 6 months as a % of the total number of opiate users in treatment.	>6.6%	9.7%	We continue to exceed local targets and England averages
			Number of users of NON-OPIATES that left drug treatment successfully (free of drug(s) of dependence) who do not then re-present to treatment again within 6 months as a % of the total number of non-opiate users in treatment.	>36.6%	46.0%	We continue to exceed local targets and England averages
Number of users of ALCOHOL ONLY that left treatment successfully (free of alcohol dependence) who do not re-present to treatment again within 6 months as a % of the total number of ALCOHOL ONLY users in treatment.			>42.8%	53.8%	We continue to exceed local targets and England averages	
Proportion of people walking & cycling	↔	Numbers of people walking or cycling increase, based on the baseline for Oxfordshire in the government's Active Lives Survey. The targets are for annual increases over the baseline of 5% (cycling) and 2% (walking).	Cycling 634,000 Walking 3,000,000	591,000 2,941,000	Comparing the 2016-18 average with the 2015-17 average has seen a slight drop in overall cycling levels. There is a particularly notable drop in Cherwell District which we are reviewing to ensure it is correct, as levels of cycling have either remained stable or increased in all other Districts.	
People play an active part in their communities	Rates of volunteering	-	Number of environmental volunteer hours generated through County Council activities	Reporting only	52,850 hours (18-19)	Annual measure, next due to report in April 2020. Volunteer hours generated in 2018-19: Thames Valley Environmental Records Centre (1,264 hours), Lower Windrush Valley Project (520 hours), events and activities run by the groups in Oxfordshire's Community Action Groups (51,066 hours)
			Number of volunteer hours contributed to library, museum & history services		Nov: 3,709.5 hours	<ul style="list-style-type: none"> Library volunteer hours: 3,010 hours contributed in November. Museum Service volunteer hours: 556 hours contributed in November. History Centre volunteer hours: 143.5 hours contributed in November.
	Prevalence of services provided by communities	-	Number of town or parish councils with devolved service responsibilities	Reporting only	127	As at 30 Nov there are 127 agreements with town or parish councils and 4 with district councils. Devolution of services is proactively being promoted.
			% of Councillor Priority Fund monies allocated to a) Community Groups, b) town or parish councils, c) direct services	Reporting only	See right	November: 61% of £1.89m allocated = £1,147,257 of which: <ul style="list-style-type: none"> 65% to Community Groups = £740,670 24% to Town/Parish councils = £276,432 11% to direct services = £130,155

WE PROVIDE SERVICES THAT ENHANCE THE QUALITY OF LIFE AND PROTECT THE LOCAL ENVIRONMENT						
OUTCOME	INDICATOR	OUT-LOOK	MEASURE	TARGET	RATE / LEVEL	COMMENTARY
Our quality of life in Oxfordshire is enhanced	Condition of highways	GREEN	A and B Classified road network where carriageway maintenance should be considered	33%	33.72%	There is no new update in November. The programme is now complete and will start again in Spring 2020. October position: slightly over target but Oxfordshire's network condition is broadly becoming stable with additional investment. There has been a very slight change from 32.48% in 2018, to 33.72% in 2019, a change of 1.24%, or 25Km. This variance could be due to a change in survey provider where a +/-variance of 2% was a known risk.
			Defects posing immediate risk of injury are repaired within 24 hours	100%	99.81%	Cumulative rate and covers all defects April to October. (Data is reported one month in arrears.)
			Defects creating potential risk of injury repaired within 28 calendar days	90%	99.79%	
			Current status of pothole enquiries reported on FixMyStreet during the calendar month prior to reporting date	No target set	Repaired: 26% Closed without action: 60% Remaining open: 14%	Total public enquiries recorded on FixMyStreet in relation to pothole and other carriageway issues in October was 673. Of these: <ul style="list-style-type: none"> 174 (26%) are now repaired. 406 (60%) were closed without action. This may be because the fault was below our intervention threshold, or the reported issue was not the responsibility of the council. 83 (12%) are still awaiting a decision from officers. 10 (2%) are waiting for Skanska to repair. This information is reported in arrears to include a full month's activity.
			Km of total highway network resurfaced as % of total	0.6%	2.18%	As at 30 November the programme for this work has delivered a total value of 2.18% of the whole network. This increased rate is due to an accelerated programme as part of the Capital Investment Programme. The target of 0.6% was set before the investment injection and will need to be reviewed in light of the expected budget for the coming years.
			% of highway maintenance construction, demolition and excavation waste diverted from landfill	90%	98.14%	Rate is the average for April to November. (Data is reported one month in arrears.)
Funding secured through planning obligations	GREEN	↔	A minimum of 70% of S106 agreements involving contributions to County Council infrastructure are completed within 6 months of District Committee resolutions	70%	100%	There were 5 agreements completed in Nov, 2 of which were applications subject to an appeal; all of which were within the 6 month target.
			Monies secured in S106 agreements represent at least 85% of the sums identified as necessary through the corresponding Single Response process	>85%	97.2%	Total is below 100% as a Public Right of Way contribution was not secured for the Oxford Brookes campus proposal at Wheatley. The overall loss of developer funding from this site is reduced to £55k through securing in full the 'bus stop infrastructure' contribution.
Levels of public transport use	GREEN	↔	Increase use of public transport in Oxfordshire over baseline as follows: Bus: DfT annual statistics for bus use in Oxfordshire: <ul style="list-style-type: none"> Bus journeys Bus use per head Bus: Transport Focus Autumn 2018 Bus Passenger Survey for Oxfordshire <ul style="list-style-type: none"> Satisfaction with overall journey Rail: Dec 2018 Oxfordshire Station use, per Office of Rail & Road statistics	34.8m 36.2	34.5m 35.8	Bus targets represent a 1% annual increase in millions of journeys taken. The rail target represents a 5% annual increase in millions of journeys taken (based on 10% increase between 2017 and 2018)
				93%	tbc	The next bus and rail surveys will take place in December. Outcomes will be known in Spring 2020
				21.6m	tbc	The survey is carried out in December – results are due in March 2020.

	Rates of access to cultural services	GREEN	↔	Increase in the number of community and cultural programs/events/attendees at events/activities hosted by Cultural Services (Museums, History, Archives and Library Services)	5% annual increase	See right	On track to achieve 5% annual increase. Benchmarking is being established quarterly during 2019/20. Attendance at Library Services 2019 quarter 2 (Jul-Sep) programmes increased by 23% over 2018 quarter 2. Museum Service and History Centre activities are presented on an annual program: the services' performance indicator provides for that annual comparison. Attendance at History Service 2019 quarter 2 (Jul-Sep) programmes increased by almost 4% over 2018 quarter 2
				Reach the upper quartile in the CIPFA (Chartered Institute of Public Finance and Accountancy) benchmarking comparison group for active library users, website visits, book issues and physical visits	Upper quartile	Not yet available	The 2018/19 CIPFA benchmarking comparison data is due to be available in February 2020.
Page 403 Our local environment is protected	Percentage of planning decisions on time	AMBER	↔	80% of District Council planning applications are responded to by us within the agreed deadline	80%	60%	113 Major Planning applications were received in November which is the highest number of applications received in last 6 months – overall team capacity and sickness absence accounts for drop below target. 81 responses were sent back for Major Planning Applications and 31 responses were sent back for Discharge of conditions applications.
				50% of Mineral and Waste applications are determined within 13 weeks	50%	100%	Two Minerals and Waste planning applications were determined in November, both within target. Year to date = 22 out of 22 within target.
	Levels of carbon emissions	GREEN	↔	Average 3% year on year reduction in carbon equivalent emissions from County Council estates and activities	3%	Not yet available	2018/19 annual emissions data is being processed. We expect the figures to be published in Q3 (December's report).
	Levels of energy use	AMBER	↑	% of streetlights fitted with LED lanterns by March 2020	22%	21.95%	As at 30 November 13,088 LED lanterns have been converted from 59,631 streetlights across the county over the past 6 years. This is 21.95% of the total street lighting assets. The current supplier (Bouygues) has as part of their contract delivered 1,532 units which is below the anticipated delivery profile of this particular stage of project.
	Air quality	AMBER	↔	% rate of delivery in the Oxford city centre Zero Emission Zone programme	100%	80%	Percentages refer to progress towards the adoption of new standards, not implementation of fleet improvements. Taxi emissions standards were adopted by Oxford City in Jan 2019 Bus Euro 6 LEZ was agreed by city and county in June. An application to the Traffic Commissioner for implementation has been submitted. Informal public engagement on a new approach to the 'Red Zone' element of the programme will start on 7 th January 2020. Work is under way on the 'Green Zone' element; an outline proposal for this will be included as part of the Red Zone engagement materials.
Proportion of household waste re-used, recycled or composted	GREEN	↔	% of household waste a) recycled, b) composted and c) re-used (and total %)	a) 30% b) 29.5% c) 0.5% Total 60%	a) 29.12% b) 29.35% c) 0.25% Total 58.73%	This is the forecasted end of year position for the amount of household waste in Oxfordshire which is recycled, composted and reused. This figure reflects the combined efforts of County, City and District Councils. The forecast end of year position is slightly below target, as recycling rates are plateauing with a change in residents' behaviour.	
			% of household waste sent to landfill. Reported performance is the forecasted end of year position.	under 5%	3.53%	On track at the end of October. A target of under 3% by 2020 is proposed in the county's Joint Municipal Waste Management Strategy. The Council continues to investigate ways to deliver against this.	
			% of household waste recycled, composted and re-used at Oxfordshire Household Waste Recycling Centres (HWRCs). Reported performance is the forecasted end of year position.	59%	59.08%	Teams are working closely with contractors to introduce opportunities to increase recycling but options are constrained by size of HWRC sites.	
			% of people satisfied with Oxfordshire Household Waste Recycling Centres	95%	96.3%	This survey is completed once per year. The next is due in March 2020.	

WE STRIVE TO GIVE EVERY CHILD A GOOD START IN LIFE AND PROTECT EVERYONE FROM NEGLECT							
OUTCOME	INDICATOR	OUT-LOOK	MEASURE	TARGET	RATE / LEVEL	COMMENTARY	
Children are given a good start in life	Prevalence of healthy children	AMBER	↑	Number of expectant mothers who receive a universal face to face contact at 28 weeks	78%	80.3%	This measure has improved to move past the target for the first time in 2019/20. Factors that have impacted negatively on this measure to date – including missing midwifery notifications, staff vacancies, patient choice and babies born early – will continue to be closely monitored.
				Percentage of births that have received a face to face New Birth Visit	95%	98.3%	This indicator continues to perform well.
				Percentage of children who received a 12-month review	93%	93%	Performance is achieving the target
				Percentage of children who received a 2-2½ year review	93%	89.3%	Whilst this performance is below target, Oxfordshire is in a strong position compared to the national performance which is 76.8%. Patient choice and staff vacancies impact on this indicator.
				Babies breastfed at 6-8 weeks of age	60%	61.7%	Performance remains strong and well above the England average
				% of Mothers who received a Maternal Mood Review in line with the local pathway by the time the infant is aged 8 weeks.	95%	98%	Performance remains strong against this local priority target
	Sufficiency of early years places	GREEN	↑	To provide sufficiency of early education placements for children aged 3 and 4 better than England average.	95%	96%	Figure for the Autumn term: 8,090 places taken up, out of forecast number of 8,396 3 and 4 year olds.
	Number of looked after children	AMBER	↑	Reduce the number of looked after children by 50 to bring it nearer to the average of our statistical neighbours during 2019/2020	750	789	We remain above the target number but are still in line with statistical neighbours. Rated Amber because of the volatility in the small number of high cost placements and its impact on budget and workload.
	Numbers of children's social care assessments	GREEN	↔	Increase the number of early help assessments to 1,500 during 2019-20	1,500	1,683	We remain slightly higher than our targets which will help manage demand in social care.
				Not to exceed the level of social care assessments in 2018-19	6,250	7,963	Figure is projected based on activity so far this year. The last 16 weeks have all been above the weekly target. Annual rate is still in line with that of similar authorities
Number of children the subject of protection plans	GREEN	↑	Maintain the number of children who are the subject of a child protection plan to the average of our statistical neighbours during 2019/2020	Under 620	593	The number remains in line with expected demand and is slightly lower than the target.	
Number of children's cases held by permanent staff	AMBER	↑	Reduce caseloads so that by March 2020 over 80% of staff have caseloads at or below the agreed target level	80%	74%	Caseloads are currently higher than target. As part of the introduction of our new Family Safeguarding Plus model, the Council is investing significant extra resource to increase the number of qualified social workers within the service, with the effect of reducing overall caseloads to ensure effective interventions.	
			Invest in the workforce so that by March 2020 80% of cases are held by permanent staff	80%	76%		
Children are able to reach their potential	% of children with a place at their 1 st preference school	GREY	-	% of children offered a place at their first preference primary school	No target set	93.3%	Although not rated, our performance on these annual measures is high compared to elsewhere
				% of children offered a place at their first preference secondary school		85.5%	
	Percentage of children at good schools / settings	GREEN	↔	% of children attending primary schools rated good/outstanding by Ofsted	93%	87.8%	Reported rates are for the end of term 1 <u>academic</u> year 2019/20.
				% of children attending secondary schools rated good/outstanding by Ofsted	86.5%	87.9%	Targets are set to be in the top quartile nationally by the end of the <u>academic</u> year 2019/20
Children missing education	GREY	-	Persistent absence rates in primary schools (%)	6.7%	10.8%	Aspirations have been reset for the 2019/20 academic year.	

Indicators marked as 'Grey' are those for which a performance target is not appropriate. They are included here so that we can provide updates on activity in these important areas.

WE ENABLE OLDER AND DISABLED PEOPLE TO LIVE INDEPENDENTLY, AND CARE FOR THOSE IN GREATEST NEED							
OUTCOME	INDICATOR	OUT-LOOK	MEASURE	TARGET	RATE / LEVEL	COMMENTARY	
Care services support independent living Page 406	Number of home care hours purchased	AMBER	↓	Maintain the number of home care hours purchased per week	21,779 hours per week	20,769	Marginal increase in the rate this month. Our Home Care 2020 project is reviewing the way we commission and purchase care, which will help stabilise market. The drop in home care hours is partly off set by the high level of direct payments which allow service users alternative ways to meet their care needs
	Number of hours of reablement delivered	AMBER	↔	Maintain the number of hours of reablement delivered to 5750 per month	5,750 hours per month	5,355	After 8 months of the year reablement levels are 6.8% below contract levels. For November 12% less reablement was delivered than contract. The average amount of care provided per person is higher than we expected when the contract was specified, meaning fewer people are supported which is having an adverse effect on delayed transfers of care
	Number of people with control over their care	GREEN	↔	Number of people with personal budgets remains above the national average	17-18 nat. av. 89.7%	92%	Over 90% of people are told how much their care costs and are agreeing the way that want it delivered.
				% of people with safeguarding concerns who define the outcomes they want	> 90%	95%	-
				% of people using Adult Social Care services who receive a direct payment remains above the national average	17-18 nat. av. 28.5%	36%	Over a third of people who live at home take their care in the form of a cash payment. This gives them greater choice and control over their care.
	Number of people delayed leaving hospital awaiting social care	RED	↔	Reduce the number of people delayed in hospital awaiting social care	6	6.5	Latest national figures for September (10.6) are worse than the target but are the lowest since April. Local figures for October 2019 have dropped to under 8
Reduce the number of people delayed in hospital awaiting both health and social care				26	57.5	These are people waiting for reablement. There is an agreed trajectory to reduce delays from 50-26 in the year. Latest national figures for October were 50.5. Local figures for October have risen to 57.5. An action plan is in place with the provider of reablement to deliver the required improvement. This is overseen by both the council and the clinical commissioning group.	
Proportion of older people supported in the community	AMBER	↔	Increase from 57% the percentage of older people in long term care who are supported to live in their own home	>57%	55.4%	There has been an increase in the proportion of people supported in care homes due to current constraints in home care supply mentioned above	
Homes and places support independent living	GREEN	↔	Increase Extra Care Housing capacity to 2,138 units by 2031	2,138 by 2031	923	A market position statement on Extra Care Housing was published in September. Our target was changed to reflect the statement.	
			Ensure the % of working age (18-64) service users with a learning disability support, who are living on their own or with their family, remains above the national average (76%)	>76%	91%	-	

Indicators marked as 'Grey' are those for which a performance target is not appropriate. They are included here so that we can provide updates on activity in these important areas.

WE SUPPORT A THRIVING LOCAL ECONOMY BY IMPROVING TRANSPORT LINKS TO CREATE JOBS & HOMES FOR THE FUTURE								
OUTCOME	INDICATOR	OUT-LOOK	MEASURE	TARGET	RATE / LEVEL	COMMENTARY		
Page 10 Strong investment and infrastructure are secured	Level of investment attracted	GREEN	↔	Funding secured as % of yearly investment required to bring the condition of all assets into good condition (identified in the Highway Investment Business Case)	95%	89.4%	Financial modelling has identified that £35.5m is required annually to maintain the carriageway asset in a “good” condition over the next 10 year period (2018/19 to 2027/28). £31.725m has been secured - this is 89.4% of the £35.5m target. Initial growth has been lower than expected. This is currently affecting the available budget in future years.	
				We participate in 20 innovation funding bids to support the Smart Oxford programme	20	12	We have submitted 12 bids to date. So far this year we have had announcements of success in 3 bids – 2 in Electric Vehicle charging innovation and 1 related to Air Quality and dynamic road management.	
				Businesses given support by Trading Standards interventions/fire risk inspections	2,293	2,917	The Trading Standards team has continued to work with other agencies saving money for consumers and resulting in convictions for some rogue traders	
				% rate of delivery against the Growth Deal infrastructure programme	80%	20%	Achieved £30m spend against £30m target in 2018-19 of the £150m budget for the 5 Year programme. The £30m has been used to fund infrastructure/highways and school capital projects which support the release of housing sites to deliver additional housing across the county. Work has commenced on Year 2 schemes and continuation of Year 1 schemes. Next update will be provided in December’s report.	
		Level of infrastructure investment required	GREY	-	Identification of investment levels required in new/improved infrastructure to 2050 (updated from Oxfordshire Infrastructure Strategy 2040)	Reporting only	See right	We are working towards commissioning an update of the Oxfordshire Infrastructure Strategy. This will happen early in 2020, subject to agreement with Oxfordshire Growth Board partners. This will enable us to set new outcomes and proposals for updated Infrastructure priorities (to 2050) by Autumn 2020, and to define the appropriate method of assessing and reporting on performance in this area.
		Number of new homes	AMBER	↑	We enable the construction of 100,000 new homes by 2031	1,215 homes in 2019/20 accelerated	1,349 forecast	This housing trajectory reflects the number of homes accelerated due to the infrastructure enabled/delivered through the Housing and Growth Deal. This forms part of the overall ambition to support the delivery of 100,000 homes across Oxfordshire.
				We support the delivery of 464 new affordable housing starts by March 2020	464	356 forecast	The forecast is currently below target, as a number of change requests have been received from the local planning authorities that have seen a slight reduction in the number of affordable homes they can deliver as part of their existing projects. Work is ongoing to understand how this can be improved during the remainder of the year.	
		Levels of disruption to journeys	AMBER	↑	Failed utility inspections no higher than 15%	<15%	22.9%	From 550 sample A/B/C inspections conducted in Nov (including all follow up inspections) 126 failed. This equates to 22.9% failure rate. The rate has increased slightly since last month (19.4%) due to a higher number of investigations (531 sample in Oct) and public reporting which resulted in more failed reinstatements. This has been addressed at Highway Authority and Utilities Committee and meetings with individual utility companies. Improvement Notices are being served on companies not providing suitable mitigation plans. The Council is moving to becoming a Permit Authority, which will give us greater powers of scrutiny and challenge. We expect this to bring an improvement in performance during quarter 3. Improvement Notices will be served on companies with category B/C failure rates higher than 10% within a 3 month period.

Indicators marked as ‘Grey’ are those for which a performance target is not appropriate. They are included here so that we can provide updates on activity in these important areas.

	Level of access to online and digital services	GREEN	↑	<p>The absolute number of premises we have enabled to have access to superfast broadband within Oxfordshire, via our contract with BT</p> <p>The % of premises in Oxfordshire with access (via either our contract or commercial providers) to superfast/ultrafast/full fibre broadband</p> <p>The % of premises in Oxfordshire without access to:</p> <ul style="list-style-type: none"> At least Basic Broadband (at least 2Mb/s) OFCOM 'acceptable' broadband (10Mb/s) 	77,500	77,533	We continue to progress well towards these targets.	
	Employment rates	GREY	-	% of Oxfordshire residents aged 16-64 in employment (against GB rate Jul 17 to Jun 18 of 75%)	Reporting only	See right		July 18 to June 19: 82.5% of Oxfordshire residents aged 16-64 were in employment. The equivalent GB rate = 75.6%
Local businesses grow and provide employment	Business numbers	GREY	-	Numbers of births, deaths and survivals of businesses in Oxfordshire (annual ONS data)	Reporting only	See right		Nov 2019 figures: Oxfordshire business births: 3,415 in 2018 (down 1% on 2017); business deaths: 2,945 in 2018 (down 6% on 2017). Business survivals: 46.5% surviving 5 years later (was 48.7%)
	Numbers of apprenticeships	GREY	-	Number of apprenticeships employed by the County Council and maintained schools	Reporting only	53	Since 1 April we have enrolled 74 new apprentices. At the end of November the total number of apprentices employed was 163.	
	Levels of workforce	GREY	-	Oxfordshire County Council Full-Time Equivalent (FTE), excluding schools	Reporting only	See right	End of November 2019: 4108.67 FTE – This is an increase on September and October (4086.77 and 4091.25 FTE)	
				Total spend on agency staff	Reporting only	See right	End of quarter 2 (September 2019): £3,941,570. This is higher than we reported at the end of quarter 1 (June 2019: £3,774,950)	

ANNEX B – RISK

This annex shows the main risks facing the Council and gives a snapshot of how we are managing them. Risks are rated according to our assessment of their likelihood and the impact on our services or resources if they were to happen. This enables us to focus on the highest-priority risks and to take actions which would help to make them either less likely, or less problematic in terms of their potential impacts. This Leadership Risk Register provides detail on each risk, including how effectively the risk is currently being managed and any further actions we plan to take to reduce the risk's likelihood or impact. Text in **bold** shows updates since the previous month's report.

Leadership Risk Register

REF	RISK TITLE	RISK CAUSE Description of the trigger that could make the risk happen	RISK EFFECT Description of the consequences of the risk, positive or negative	RISK OWNER	INHERENT RISK SCORE			EXISTING CONTROLS Description of actions already taken or controls in place to mitigate the risk	RESIDUAL RISK SCORE			FURTHER ACTION REQUIRED	ACTION COMPLETION DATE(S)	COMMENTS	DATE LAST UPDATED
					IMPACT	LIKELIHOOD	RISK RATING		IMPACT	LIKELIHOOD	RISK RATING				
LR1	Demand management	That increased demand for statutory service is greater than the resources available to meet statutory duties, community needs and political aspirations. This may be due to changing demographics and growth, leading to more requests for children's services, adult services and housing. Failure to reconfigure services (both directly provided and commissioned by the Council) to become more preventative in their approach, could exacerbate the effect of rising demand	Reduced confidence in the Council's ability to deliver services Poor timeliness and prioritisation of services leading to poor engagement from partners and the community. Potential for legal requirements not being met. Services to the most vulnerable residents or groups are disrupted or not provided due to ineffective assessment and prioritisation processes. Failure to balance budget and/or maintain capital investment strategy in infrastructure. Financial – significant overspend in annual budgets	Lucy Butler & Stephen Chandler	5	2	10	Maintain a good early-help and prevention offer, in partnership with key stakeholders to ensure diversion from high cost services. Maintain good communication of early-help and prevention offer within the community to ensure effective uptake of services. Maintain good practice and performance reporting to ensure timely triage and assessment of contacts into services. Efficient assessment of need and risk – strong 'Front door' arrangements including effective MASH. Business as usual - all services are tasked with managing activities within allocated budgets Transformation - reconfigure services to be more preventative in their approach, drive out failure demand, and involve partners and the Voluntary and Community Sector IMPOWER identified OCC as 5th most productive council for older people, recognising the high number of people who are offered equipment and alternative technologies to help them remain independent and reduce demand	5	2	10	Continue existing controls including partnership work and transformation programme. Demand management in children's showing success early help assessments ahead of target; activity levels other than looked after children lower than elsewhere. The next phase of Transformation must concentrate on managing demand and in particular supporting directly provided services and those that we commission, to develop a more preventative approach. Our new Family Safeguarding model will reduce the numbers of looked after children in particular.	Ongoing		13/12/2019
LR2	Safeguarding of vulnerable adults and children	Risk of death or serious injury to children, young people or vulnerable adults through inadequate service delivery or failure to provide protection.	Potentially devastating impact to an adult, child, family and community. Reduced trust in the Council and partners. Notification of poor performance may affect the Council's current service judgements and lead to Central Government intervention, resulting in a higher financial cost related to improvement activity and intervention.	Lucy Butler & Stephen Chandler	5	3	15	Maintain strong focus on good practice, performance reporting and statutory requirements, ensuring timely record keeping, compliance with procedures and acting on any poor performance indicators at an early stage. Monitored monthly by CEF Performance Management Framework. Daily monitoring report for ASC deputy-director with monthly scrutiny at ASC Performance Board. Efficient assessment of need and risk by having strong 'Front door' arrangements in place, including effective MASH. Centralised Adult Safeguarding Team with overall responsibility for triaging and managing section 42 enquiries. Regular audit of practice casework in both CEF and ASC to ensure good quality service delivery. This is monitored monthly through CEF and ASC Quality Assurance Frameworks and Performance Boards. Completion of CEF Self-evaluation report every quarter which is submitted to Ofsted at the Annual Conversation.	5	2	10	Ongoing management oversight through the implementation of the CEF and ASC Performance Management Framework and Quality Assurance Framework. Safety ratings for social care providers in Oxfordshire remains higher than elsewhere	Ongoing	Risk reviewed; no updates made	13/12/2019
LR3	Growth Deal	Infrastructure outputs and outcomes as set out within the Housing and Growth Deal are not achieved	Withdrawal of funding, lack of accelerated homes delivered and potential breakdown in collaborative working across Oxfordshire local authorities. • Reduced delivery of affordable housing and related impact on the community • Lack of investment in road infrastructure to support current housing delivery and future planned growth leading to a severe impact on the network or the Council objecting to new development. • Additional strain on the highways network that could restrict the county's ability to improve productivity • Lack of a strategic framework for future growth in the county. • Constraint on economic development	Simon Furlong	5	3	15	The overall Housing and Growth Deal programme is managed through the Growth Deal core team and governed through the HGD Programme Board. All programme management information provides a degree of risk control, including: Benefit map realisation Change management Programme framework Programme plans and reporting Live actions log	5	3	15	Resources are being mobilised from across OCC to increase capacity to deliver Growth Deal schemes. We have also allocated a Director to focus on OCC Infrastructure Delivery which will address senior management capacity challenges. The remit of this role is to focus on delivering the capital programme and establishing the appropriate internal processes to speed up delivery. This includes establishing a Programme Management Office and new governance structure to deal with the volume of schemes in the pipeline and provide, for example, technical programme management, risk/assurance management, performance management and a broader partnership function. This will be in place by Spring 2020. The risk register for Housing & Growth Deal partners is in progress and expected to be complete by Spring 2020	March 2020	Following CEDR discussion this risk is scheduled for review and revision by 17 Jan 2020	19/12/2019

Leadership Risk Register

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LR4	Local resilience, community resilience, cohesion	Significant unrest due to community tensions	Broad impact on Council's ability to deliver services if disruption affects particular locations, customers or staff	Simon Furlong	2	2	4	Thames Valley Police and Safer Community Partnership are monitoring communities to identify any issues that may indicate escalating community tensions. Actions completed to ensure communication network in place to provide single consistent messaging via multiple trusted sources should it be needed	2	1	2	Continue existing controls and monitor community situations through all service contacts, Localities, Members etc. Additional conversations led by Lord Lieutenant and Community Leaders with follow up meeting in December.	Ongoing	Reviewed; no change from last update	28/11/2019
LR5	Management of partnerships (non-commercial)	Ineffective partnership working and relationships with key strategic partners, including District and City Councils, the CCG, NHS, Police, Military and voluntary and community sector, leading to negative impact on service delivery and outcomes for local residents / communities	Deterioration of key relationships could reduce the Council's ability to: • meet desired outcomes for residents, • achieve efficient delivery • take opportunities to improve services. It also has the potential to negatively affect public confidence in the Council (e.g. through inspection outcomes) Failure to work effectively with the local Voluntary & Community Sector (VCS) might impact on our ability to both support and utilise the capacity and capability of the sector to help generate community resilience, community willingness to effectively address local needs and help to reduce demand for services (e.g. prevention)	Claire Taylor	4	2	8	<ul style="list-style-type: none"> Ongoing management of existing relationships held at Cabinet and senior officer level, including sharing of priorities and early discussion of potential changes or challenges Supported by regular engagement and interaction at different levels of the organisation, including joint working initiatives and shared posts Formal/informal meetings with main bodies and sector representatives Participation and engagement in local partnerships, forums and project / policy development work The Civilian / Military Partnership is implementing changes to how it operates, and investing in supporting the County Council to achieve Gold status under the Armed Forces Community Covenant Health and Wellbeing Board has oversight of development of Integrated Care System and pooled budget arrangements Growth Board retains oversight of the implementation of the Housing and Growth Deal and Housing Infrastructure Fund schemes. 	3	2	6	<ul style="list-style-type: none"> Overall review of partnerships in the county, including Oxfordshire Partnership, bilateral working New working relationships with VCS and infrastructure support contract are being developed, with contract to be in place by April 2021 - procurement to start in summer 2020 Community development strategy and approach to be produced and implemented jointly with VCS 	Various	Reviewed, updates to existing controls	20/12/2019
LR6	Supply chain management	The supply chain could fail as a result of a major supplier entering insolvency procedures either via administration or liquidation. .	Delays to meeting service requirements or service provision.	Lorna Baxter	4	2	8	The Procurement team has awarded a contract for a credit check service that analyses the financial position of an organisation to determine a credit score. This information is used in the Tender evaluation process to select a suitable supplier and to monitor ongoing performance of current suppliers. Current suppliers that see a drop in their financial rating would trigger an alert that would be considered by the applicable contract manager.	4	2	8	The Provision Cycle transformation programme will, in part, seek to improve the commercial capacity and capability of the Council through applying a Category Management approach. This approach to embed increased capability to better monitor and manage this risk, resulting in category strategies that reduce the impact of failure through establishing supply chain contingency plans and improved monitoring tools to reduce the likelihood.	Ongoing	Risk reviewed; no updates made	28/11/2019
LR7	Delivery of statutory duties	That the Council acts unlawfully by failing to deliver statutory responsibilities	<ul style="list-style-type: none"> Litigation/judicial review Financial penalties - Local Government Ombudsman/Regulators/Central Government Damages liability to residents and commercial counterparties Central Government intervention 	Nick Graham	4	3	12	Constitution of Council (including Finance Procedure Rules and Contract Procedure Rules) Support role of Finance, Legal and Procurement Audit function Legal Compliance and Service Plan Service Level Agreements between directorates and Legal	4	1	4	Ensure support functions are fully resourced Action plan is in place to ensure we address our statutory duties for the Deprivation of Liberty Safeguards for adults. Action plan is in development in relation to our statutory duties for children with Special Educational Needs and Disabilities.	Ongoing	Risk reviewed; no updates made	31/12/2019
LR8	Corporate governance	That the Council's corporate governance is insufficiently robust, either due to incomplete processes or limited staff awareness of its requirements	Inconsistent, uncompliant or potentially unlawful actions/decisions.	Nick Graham	2	2	4	<ul style="list-style-type: none"> Council governance framework is regularly reviewed and updated by senior managers and members. Constitution - updated and annually reviewed by Monitoring Officer and Full Council. System of internal control - co-ordinated by the Corporate Governance Assurance Group; overseen by the Chief Internal Auditor; elected member oversight by Audit & Governance Committee, which reviews the Annual Governance Statement. Annual Governance Statement – annual opportunity to review the effectiveness of internal controls; signed by Leader and three statutory postholders (HOPS, MO, CFO); overseen by Audit & Governance Committee. 	2	1	2	Continue to undertake control measures throughout 2019-20 and respond to specific matters as they arise. Draft Corporate Lead Statements have been commissioned and are due for completion in January	Ongoing		31/12/2019

Leadership Risk Register




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LR9	Workforce management	Lack of effective workforce strategies may result in long term under-performance of the organisation or increased costs.	Failure to manage the workforce and develop strategic HR plans may result in the following: •Recruitment and retention issues •Increased costs of agency staff •Increased costs in training and development •Underperformance or lack of delivery	Claire Taylor	3	4	12	<ul style="list-style-type: none"> •On-going monitoring of issues and HR data •Key staff in post to address risks (e.g. strategic HR business partners, reward manager) •Ongoing service redesign will set out long term service requirements •Dedicated recruitment resource 	3	2	6	Development and adoption of sector relevant workforce plans Development of new People and Organisational Development strategy Development of new Learning & Development strategy, including apprenticeships	March 2020	Risk reviewed; no updates made	03/01/2020
LR10	Organisational Change and Service Design	The Council's portfolio of organisational change and service redesign programmes and projects under-delivers due to lack of capacity, expertise or governance.	The impact of the risk occurring would be failure to realise improved service delivery, quality and inability to respond to growing demands. Furthermore inefficiencies may result in increased costs and/or lack of delivery of planned savings. The breadth of the programme means that it is built of many constituent parts, so that if any one project fails, it can be 'tied off', replaced or redesigned. This breadth means that risk is managed across a wide portfolio but it also requires the right capacity, skills and governance to ensure delivery.	Claire Taylor	4	4	16	<ul style="list-style-type: none"> • All projects clearly identify benefits to be delivered and the long term financial implications (upfront costs and savings), supported by project plans and milestones where appropriate • Clear financial benefits realisation articulated in all project plans, regularly monitored through monthly highlight reports and integrated with the council's business management monitoring report process • Systematic service improvement activity focused on demand management, and developing a more preventative approach to our services • All project resourcing considered monthly, roles allocated and additional 3rd party support commissioned where there is a lack of internal capacity or skills • The Joint Audit & Governance and Performance Scrutiny (Transformation) Sub-Committee receives quarterly reviews of progress made, supplemented by detailed financial analysis that reflects the explicit link between the programme of work and the council's Medium Term Financial Plan • Where joint activity is planned the Partnership Working Group review progress and delivery. • Capacity and expertise is managed through inhouse resources (including development of new skills where necessary) and the use of external professional support where required – a mixed economy model of delivery. 	4	2	8	<ul style="list-style-type: none"> •Ensure that the entirety of the council's change agenda, including all existing programmes are integrated into one overall portfolio of change programmes that lead and inform the emerging Service and Resource Planning Process, and expand in scope where further savings are required • Continue to ensure that detailed planning and monitoring of projects fully understands interdependencies between projects •Ensure all change activity is fully aligned to, and supportive of the corporate priority setting and medium term financial planning process • CEDR to regularly review the council's full portfolio of change programmes' (both corporate and service focused) fitness for purpose and delivery, as part of quarterly reviews reported to members 	Various	Risk reviewed; actions revised for clarity	13/12/2019
LR11	Financial resilience	The MTFP and longer-term financial plans are not sustainable, adequate or effective due to the outcomes of local government funding reforms; unexpected demand on services; financial management performance; or not achieving planned savings and efficiencies on time.	Significant overspend at year end leading to: • extensive use of general balances, taking them below their risk assessed level • extensive use of earmarked reserves resulting in no funding available for earmarked purpose • further savings or income generation required in year or across the life of the Medium Term Financial Plan (MTFP) Further reductions to funding will require additional savings or income generation opportunities above those in the existing MTFP. Given the scale of the reductions already delivered and those planned, plus continuing rising demand in Adults and Children's services, the ability to respond to this, and quickly, could put at risk the setting of a balanced budget and MTFP.	Lorna Baxter	5	3	15	<ul style="list-style-type: none"> • Progress against current year's savings is tracked monthly and included in the Business Management Reports to Cabinet. • Progress against future year's savings is also tracked monthly, and if necessary addressed as part of the Service & Resource Planning process • Savings under the banner of Organisational Change and Service Design being monitored on a project/activity level with detailed planning, milestones & reporting • Regular meetings between Directors and s151 Officer to discuss significant financial issues and risks • Service & Resource Planning process including reports to Cabinet and Performance Scrutiny Committee and ultimately Council in February 2020 • s25 report of Chief Finance Officer 	5	2	10			Risk reviewed	03/01/2020
LR12	Property and assets (maintenance cost)	Legacy of poor asset condition management information reduces the Council's ability to fully ensure property maintenance and compliance.	Non-compliance issues and potential financial pressures to bring our assets to a compliant and acceptable standard.	Simon Furlong	4	3	12	<ul style="list-style-type: none"> Property, Investment and Facilities Management function redesign to get the right professionals running the service Develop Property Strategy which would determine where to prioritise efforts/spend on assets Install right systems to enable us to keep on top of managing information about our assets 	4	2	8	Control activities are prioritising compliance (ie 'nice to haves' can wait) Taking more long term views on use/potential use of certain assets. New asset condition surveys may indicate additional financial pressures to bring maintenance of our assets to an acceptable condition.	Ongoing	Risk reviewed; no updates made	28/11/2019




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LR13	Health and safety	Identified weaknesses in governance policy could lead to reduced oversight of health and safety issues and infringe on our associated duty of care to staff and others affected by the activities of the Council.	<ul style="list-style-type: none"> Unsafe services leading to injury or loss Breach of legislation and potential for enforcement action. Financial impact (compensation or improvement actions) 	Nick Graham	4	3	12	<ul style="list-style-type: none"> H&S policies and procedures have been reviewed and adopted Information and training programmes under way for managers and staff H&S Governance Board maintains oversight of policy and practice H&S Monitoring and Inspections help strengthen understanding and provisions Additional budget has been allocated (logged as a pressure) for rectifying all H&S and compliance items across our buildings and to bring full statutory compliance We have established a H&S and Compliance function within Property, Investment & Facilities Management where the right expertise is now in-house to enable us to bring and maintain the right level of compliance in the organisation 	4	2	8	<p>We will provide assurance on effective controls to the H&S Governance Board: H&S monitoring will be carried out in selected services to assess compliance; Reporting of key data and issues to Leadership Teams;</p> <p>Ensuring staff receive the necessary health and safety training;</p> <p>Internal Audit review to assess progress with agreed actions; Health and safety risk registers to be reviewed in Internal Audit process.</p>	Ongoing Dec 2019 Dec 2019		12/12/2019
LR14	Business continuity and recovery	If Business Continuity arrangements are insufficiently robust or inconsistently applied, this could restrict our ability to maintain the delivery of services to residents the expected standard.	Significant disruption to the delivery of essential Council Services which are not recovered within a reasonable time frame. Impacts could include risk to life or welfare, financial loss (for example due to litigation) and reduction of trust in Council services	Simon Furlong	2	3	6	A business continuity improvement programme is under way and has led to significant improvements including to a consistent approach to business impact assessments, service business continuity frameworks and business continuity plans.	2	2	4	<p>Ensure all Business Continuity plans are completed, and that relevant training and exercising has been undertaken. This is monitored by Audit and Governance with a further internal audit due in December 2019.</p> <p>Continued focus on delivering effective Business Continuity Management via the Extended Leadership Team and assured by internal audit process.</p>	Dec-19	Business Continuity Action Plan is progressing well: all plans now identified and 87% are in place. Next phase is to implement an exercising regime. Internal Audit expected in Quarter 4.	01/11/2019
LR15	Cyber security	Levels of threat mean that it is possible our defences will be breached, whether through system failure or human error	A serious and widespread attack (like Wannacry in Health) could mean we cannot function or support services, causing business continuity plans to be invoked. There may be less serious lower level theft of data or a publicity type attack.	Claire Taylor	4	4	16	A robust plan is in place and under continuous improvement. OCC is Public Services Network and 'Cyber Security Essentials Plus' accredited. OCC is also working with other local government organisations to ensure a co-ordinated approach to Cyber Security events.	4	3	12	<p>As part of the IT service redesign a joint OCC/CDC Cyber Security post will be created and recruited to, to undertake:</p> <ul style="list-style-type: none"> Sole responsibility for managing security threats and prevention methods. Working with Information Management Team to ensure implications of GDPR on data security are understood and built in Working with partners (e.g. police) to provide awareness training so that every OCC user is aware of their role in preventing cyber threats. Documenting processes and policy to clearly define roles, responsibilities and procedures. Maximising the use of technology to reduce cyber risks (network, application, monitoring). Ensuring all suppliers meet cyber security requirements for new and existing contracts. 	Mar-20	Risk reviewed; no updates made	31/12/2019
LR16	ICT Infrastructure	The server infrastructure, backup and disaster recovery hardware is at or past end of life	There is a risk of ICT failure which could disrupt our ability to sustain parts of the Council's services. We need to plan replacement as the backup solution has started to fail intermittently.	Claire Taylor	4	3	12	A successful procurement has been conducted and a supplier selected. Risk level remains the same at this stage in the project. The project's RAG rating is Green. Day to day risks are controlled by the service in partnership with the supplier.	4	2	8	<p>The primary datacentre will be in and fully configured by the end of Q4 2019/20.</p> <p>The Disaster Recovery provision will also be refreshed and should be available on the same schedule.</p>	Mar-20	Risk reviewed; no updates made	31/12/2019

Forecast outturn 2019/20 at November 2019





Key:

RAG status
 Red
 Amber
 Green

Direction of travel (change since last month)
 Improving
 Stable
 Worsening

Children's Services

£3.1m (2.6%) forecast overspend

<p>Education & Learning</p> <p>RAG rating </p> <p>Direction of travel </p> <p>Variation £0.6m (2.2%) overspend</p> <p>Action Plan Not required</p>	<p>£0.3m overspend forecast in relation to SEN Home to School Transport. This forecast is based on current demand along with average growth seen in recent years. There remains a risk that demand will remain high in 2019/20 and increase the forecast spend in this area. To ensure the budget reflects a reasonable baseline and allow time for savings to be implemented and costs to be reduced, a temporary virement of £2.2m from the corporate contingency budget to the SEN Home to School Transport budget for 2019/20 has been approved which has reduced the forecast overspend from £2.5m to £0.3m.</p> <p>There is a pressure due to deficit balances in schools which have or are due to convert to academy status. The value is currently estimated at £0.3m-£0.4m and it is unlikely that this can be met from existing resources at this time. £0.1m of this relates to a school which has already converted and the deficit balance has been confirmed.</p>
<p>Children's Social Care</p> <p>RAG rating </p> <p>Direction of travel </p> <p>Variation £0.8m (2.5%) overspend</p> <p>Action Plan Not required</p>	<p>An overspend of £0.4m is reported within the Children's Social Care teams. £0.1m of this relates to spend on young people in care within the Looked After Children teams and £0.3m in relation to staffing pressures across Children's Social Care due to increased demand. The number of Child in Need and Child Protection cases has increased this year, putting increased pressure on the Family Solutions Service, with Assessment Team demand remaining steady, but with seasonal variations. In both cases to meet demand in line with statutory requirements this requires the service to minimise the number of vacancies. It is particularly challenging to recruit experienced social workers, and therefore this results in an increased use of agency workers. Each team has a recruitment and retention plan with the aim of addressing agency spend over the longer term. These teams will be part of the Family Safeguarding Model from June 2020.</p> <p>An overspend of £0.4m is forecast in legal costs, a result of an increase of activity across the service, work is being carried out to identify whether this can be addressed in the longer-term. This is made up of a £0.2m</p>

pressure from services provided by the internal legal services and a £0.2m pressure on external specialist advice.

The implementation of the family safeguarding plus model to deliver Children's Social Care was approved by Cabinet in July 2019. Cabinet also agreed that the savings in the MTFP associated with this service would no longer be delivered in the same time frame and that the **£0.8m** planned for 2019/20 would be funded from Corporate Contingency.

**Children's
Social Care
Countywide
Services**

£0.1m overspend on Safeguarding as a result of the use of agency staff within the team to cover staff absence.

£1.7m overspend forecast due to savings which are currently not expected to be achieved relating to third party spend.

RAG rating



**Direction of
travel**



Variation

£1.7m

(3.4%)

overspend

Action Plan



Being
developed

An increase in demand for higher cost placements has been identified this month and will likely cause an overspend in the Corporate Parenting Budget this year. This budget is highly volatile and spend can change quickly as numbers of Looked After Children change. With the average costs being high a small change in numbers of young people can create a significant change in overall spend. Variations can also be driven by a change in placement type.

There is a gap in provision for children whose needs and risk presentations require small group living, such as 1 to 2 bedded residential placements. These children have very complex needs e.g. emergent mental health need, exiting acute health settings, knife crime, high levels of violence, fire setting and child exploitation risks.



Further work is being carried out to validate the change in the forecast and an update will be given in the next report.

DSG Funded Services

<p>High Needs DSG Block</p> <p>RAG rating</p> <p></p> <p>Direction of travel</p> <p></p> <p>Variation £12m to £14m (23.2% to 27.1%) overspend</p> <p>Action Plan SEND Sufficiency of Places Strategy approved by Cabinet in December 2018 to be supplemented by further actions currently in development</p>	<p>£12m to £14m overspend against the in-year High Needs Block Dedicated Schools Grant. This includes the effect of a temporary additional allocation to be received in 2019/20 of £1.5m and a one-off transfer from the Schools DSG block of £1.8m.</p> <p>The variation is due to an increase in the number of Education Health Care Plans (EHCPs) that the local authority maintains. Over the last year this increased by just under 500 plans. Since the beginning of this financial year, the Council is issuing an average of 50 additional plans per month and this is having a significant impact on team resources. The increase in EHCPs has led to additional cost to meet the needs of students in mainstream schools and an increase in the request for specialist placements. This has led to many children being placed in the independent non-maintained sector, where placements are on average £0.055m per place per annum plus transport costs.</p> <p>The risk remains that the overspend will increase significantly due to exceptional demand for special school places, however the forecast range has narrowed from the £9m to £15m forecast earlier in the year as there is now greater certainty with the majority of special school and further education college secured in the new academic year.</p>
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Adult Services

£0.7m (0.4%) forecast overspend

<p>Better Care Fund Pool</p> <p>RAG rating</p> <p></p> <p>Direction of travel</p> <p></p> <p>Variation £0.3m (-0.4%) underspend</p> <p>Action Plan</p>	<p>Combines health and social care expenditure on care homes, activity relating to hospital avoidance and prevention and early support activities for older people and adults with physical disabilities.</p> <p>While an improvement plan is underway, the forecast reablement activity provided through the contract with Oxford University Hospitals NHS Foundation Trust continues to be lower than budgeted. The council's share of the <u>underspend</u> based on current activity would be £0.8m.</p> <p>Home support capacity is broadly being maintained but the local market continues to be impacted by workforce availability. Based on current activity a forecast a breakeven position is being</p>
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reported, an increase of £0.1m from the previous month. The forecast includes a £0.1m increase in direct payments, a £0.1m increase in the cost of short stay provision plus a £0.1m reduction relating to a high functioning autism pressure previously reported within this pool now shown within the Adult with Care and Support Needs pool.

Since the beginning of the year equipment to enable service users to live independently at home has been delivered by a new service provider. The latest activity information implies a forecast overspend of **£0.3m**. The overspend reflects an additional £0.1m paid to the previous provider at the end of the contract and £0.2m relating to actual activity in 2019/20.

Based on current activity, the budget for care home placements is forecast to overspend by **£0.3m**, (0.7% of the total care home budget). The decrease of £0.2m reflects a £0.1m reduction in future commitments plus a £0.1m reduction linked to high functioning autism as mentioned above. Over the year there is an increase in service user contributions being reported which is partly offsetting £1.0m of undelivered of savings linked to changes to commercial arrangements.

The forecast also assumes that an estimated reduction in the income impairment, will not happen resulting in a pressure of **£0.4m**. An update on the expected impairment position at year end will be reported next month.

£0.7m of the £1.4m held in reserves for 2019/20 Winter Pressures activity has been agreed to be used to support projects to enable hospital discharges. £0.5m is being used to provide short stay beds with the remaining £0.2m being available to support other urgent spend.

Adults with Care and Support Needs Pool

RAG rating ▲

Direction of travel ↓

Variation £4.1m (4.8%)
overspend

Action Plan

Supports a mix of health and social care needs for adults of working age with learning disabilities, acquired brain injury or mental health needs. The risk share arrangements for 2019/20 as agreed by the Joint Management Group set out that the council will manage the variation on this pool in 2019/20 subject to OCCG increasing their contribution and taking action to manage any pressure relating to service users with health needs as a result of an acquired brain injury. Any variation associated with service users falling outside of the Outcome Based Contract for Mental Health will be divided equally between the partners based on original budget contribution before any saving.

The forecast includes a **£0.6m** overspend relating to increased packages. This has reduced by a £0.1m as activity in November was lower than expected in the previous forecast.

A **£0.1m overspend** is being reported within blocks and contracts reflects the cost of voids being higher than initially anticipated.

£1.3m forecast overspend relates to the social care element of placements in out of county schools and colleges for 18 to 24-year olds with Special Educational Needs (SEN). Work to clarify all the placements and costs, to improve the ongoing visibility to Adult Social Care, and to ensure that relevant health costs are recharged to the appropriate organisation, is continuing.

£0.5m overspend relates to one – off sustainability costs paid to a provider for the continuing delivery of a contract going through a prolonged procurement process. These costs have now ended.

There is a forecast **overspend** of **£0.1m** relating to service users with Acquired Brain Injury (ABI) with social care needs. Because of the unpredictability of their needs and the high cost of individual care packages this forecast will fluctuate month to month.

The cost of care for people with high functioning autism will now be held and reported within this pool. The forecast includes a **£0.2m overspend** arising as a result of unexpected growth in this area. This pressure for under 65 year olds has previously been reported as part of the Better Care Fund Pool.

Savings totalling £2.4m are built into the council's contribution to the pool in 2019/20. Plans to implement these are progressing but based on current plans **£1.3m** is at risk of slipping to 2020/21 or not being achievable contributing to the **overspend** within the pool.

Non-Pool Services

RAG rating



Direction of travel ↓

Variation -
£3.1m
(-22.8%)

Action Plan
Not required

Unallocated on-going base budget of **£2.7m** is being held outside the pooled budgets. **£1.7m** is funding built into the Medium-Term Financial Plan for the on-going effect of inflationary pressures agreed in 2018/19. However, as in 2018/19, these costs will again be met from the iBCF grant funding, releasing the equivalent base budget to support other pressures.

A budget of **£0.7m** originally related to Care Act implementation and the withdrawal of the Independent Living Fund. This has been used to manage a range of demand led pressures in the pools in the last two years and continues to be available in 2019/20.

An exercise was undertaken to highlight any uncommitted budgets resulting in **£0.3m** budget being identified to offset existing pressures. This is a £0.1m reduction from last month.

All of the **£2.7m underspend** is being used to offset the forecast pressure within the Adults with Care & Support Needs pooled budget.

A **£0.1m underspend** is reported within Adult Protection & Mental Capacity, arising as a result of vacant posts.

Within provider and support services, an estimated underspend of **£0.3m** is being reported.

There are additional costs of £0.2m for the review team. This pressure is being intended to be offset against underspends held elsewhere within staffing and infrastructure.

All other areas are currently reporting a breakeven position noting on-going challenges around the recruitment and sustainability of social work capacity required to support the implementation of the Medium-Term Financial Plan and on-going work.

Commissioning RAG rating



Direction of travel



Variation £0.0m

Breakeven

Action Plan

Not required

The service is currently reporting a breakeven position.

Public Health

£0m (0%) breakeven position after a transfer of £0.5m to the Public Health reserve

RAG rating



Direction of travel



Variation
£0.0m (0%)

Breakeven

against
£29.9m
ringfenced
grant

Action Plan





Not required

The forecast position includes a **£0.2m underspend** arising as a result of staff vacancies held within the service, **£0.3m overspend** reflecting the increase in demand for residential detoxification for substance misuse problems, plus a further **£0.6m underspend** due to reduced spend on sexual health services through efficiencies gained by using a more refined costing tool within the new contract and lower than predicted out of area spend as other authorities move to the same refined costing tool, this is a further underspend of £0.1m from the previous month.

The underspend will be in reserves and used to meet eligible Public Health expenditure in future years. The total funding in the reserve was £1.0m at the start of the year and is now forecast to be £1.5m.

Communities

£0.0m (0.0%) forecast breakeven

<p>Planning & Place</p> <p>RAG rating </p> <p>Direction of travel </p> <p>Variation £0.0m (0.0%) variance</p>	<p>Reporting a breakeven position with no variance from last month. Income levels are being realised as forecast, however, some risks are emerging through the current pause in South Oxfordshire District Council's Local Plan making process. Potential resulting financial pressures are likely to be felt in 2020/21.</p>
<p>Community Operations</p> <p>RAG rating </p> <p>Direction of travel </p> <p>Variation £0.0m (0.0%) underspend</p>	<p>A breakeven position overall with underspends in Waste Management offsetting increased demand on highways maintenance and Parking Account pressures.</p> <p>£0.8m pressure on the Parking Account due to the combination of an historical downturn in Parking income and increased running costs.</p> <p>£0.5m pressure on highway defects and winter maintenance, partly due to the recent bad weather.</p> <p>£0.2m pressure relates to a loss of trading income for the ITU as a result of a contract ending.</p> <p>£0.2m pressure relates to additional Depot Works over and above budget.</p> <p>£0.3m pressure relates to the pension costs resulting from structural changes in Cultural Services.</p> <p>£2.0m underspend is reported in Waste management reflecting savings in contract management costs (-£0.8m) and tonnages in all waste streams being lower than budgeted (-£1.2m). The following table outlines this tonnage reductions.</p>

Waste Management Outturn Variance		
Spend Type	Variance	Note
	£'000	
Tonnage	- 1,200	3.6% reduction in tonnage disposed, now forecast at 270kt (-£800k) and some price reductions (-£400k), mainly in ERF.
TOTAL	- 1,200	
Budgeted Tonnage 280 Kt		
Budgeted Tonnage Targets		Notes
Recycling	58%	On target - tonnage down by 6Kt
Energy Recovery	38%	On target - tonnage down by 3Kt
Landfill	4%	On target - tonnage down by 1Kt
	100%	

Property & Investment

RAG rating



Although a nil variance is reported at present, the plans for reshaping the service continues, post Carillion and although this will bring about opportunities in redesigning the service, there is a risk of short-term financial pressures. This includes risk of additional pressures following the asset condition surveys in bringing the estate to a safe/appropriate level of operation.

Direction of travel



Variation

£0.0m
(0.0%)
variance

Community Safety

A breakeven position is currently reported however there is a financial risk on the On-Call Firefighter budget due to the potential for adverse weather events this winter.

RAG rating



Direction of travel



Variation

£0.0m
(0.0%)
variance

Resources

£0.2m (-0.7%) forecast underspend

Resources **£0.1m overspend** relates to a number of small pressures across HR and Democratic Services.

RAG rating



Direction of travel



Variation
£0.2m (-0.7%)
underspend

£0.1m overspend reflects a pressure on the Legal Services budget. An increase in external and internal income receivable is forecast to partly-mitigate cost pressures previously reported. Legal costs continue to exceed the expenditure budget, reflecting the increased counsel costs and court fees for complex childcare and increased directorate demand necessitating additional resource across the team.

A review of legal services internal recharges to date has highlighted a potential full year pressure of £0.4m on legal budgets in Communities and People directorates which is reported in service and resource planning for 2020/21.

£0.2m overspend relates to the unfunded costs of the interim Procurement team which will be in place for the remainder of the financial year. The ongoing pressure will be addressed as part of Provision Cycle service redesign which is to be implemented from April 2020.

£0.1m overspend relates to the net position for the Customer Service Centre. This includes a reported pressure in the Blue Badge Administrative Service due to increased demand following the national implementation of the 'Hidden Disabilities' criteria.

£0.7m underspend reflects the vacancies being held in the ICT service. The service will review its resourcing requirements to deliver the new IT strategy. The strategy sets out the 3–5year technology requirements for the organisation including savings targets. Departmental staffing budgets currently underspent will be considered alongside the strategy.

Corporate Measures

General Balances

RAG rating



Direction of travel



The current forecast for general balances at 31 March 2020 is **£21.8m**. This is **£2.5m** higher than the risk assessed level of **£19.3m** as set out in the Medium-Term Financial Plan (MTFP) approved by Council in February 2019. This position assumes that forecast Directorate overspend of £3.6m is met from the remaining corporate contingency budget of £3.4m and £0.2m of the Strategic Measures underspend, with the remaining £0.1m underspend on strategic measures being returned to balances.

	£m	£m
General Balances at 1 April 2019		28.0
<i>Calls on Balances>Returns to Balances</i>		
Budgeted Contribution to Transformation Reserve	-6.0	
Northfield School Revenue Costs	-0.3	-6.3
Strategic Measures Underspend		+0.1
Projected Level of General Balances at 31 March 2020		21.8
Risked Assessed Level of General Balances 2019/20		19.3
Level of surplus balances		2.5

Reserves

RAG rating



Direction of travel



Unplanned Use >£250k

Reserves are forecast to be **£68.2m** at 31 March 2020, an increase of **£2.9m** since the last report which mainly relates to slippage on projects funded from the Transformation Reserve and Budget Priorities Reserve.

This includes a forecast mid-range deficit (between £12m and £14m) on the High Needs DSG grant reserve of £12m included in the Grants and Contributions Reserves. This is forecast to be carried forward to future years via earmarked reserves in accordance with recent clarification and guidance from DfE.

Cabinet are requested to approve the creation of a redundancy reserve. This will be used to fund the redundancy costs of the transformation programme. Cabinet are also asked to approve a transfer of £1m from the Budget Priorities Reserve to the Redundancy Reserve.

**Medium
Term
Financial
Plan
Savings**

The 2019/20 budget includes planned savings of **£36.8m** of which £15.9m relates to Corporate saving plans and £20.9m relates to Directorate saving plans. Overall, 79.8% of savings have been delivered or are forecast to be delivered by year end compared to the target of 95% set out in the budget agreed by Council in February 2019.

RAG rating



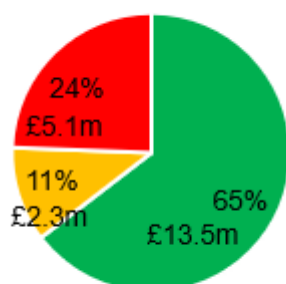
£15.9m, 100%, of Corporate Savings Plans have been or are forecast to be delivered by year end.

**Direction of
travel**



**% of
savings
expected to
be achieved
95%**

Directorate Saving Plans



■ Green & Delivered ■ Amber ■ Red

£13.5m, 65%, of Directorate savings plans have been or are forecast to be delivered by year end.

£2.3m, 11%, are assessed as amber and are at risk of not being delivered in full year.

A further £5.1m, 24% are assessed as red and are not expected to be delivered in year.

The following Directorate saving plans are assessed as red:

Service redesign	£0.6m	Service redesign is underway for finance, strategic capabilities and the provision cycle. Implementation dates for these will mean that full year savings will not be achieved in 2019/20.
Children's Services – Review of Third Party Spend	£1.7m	As reported above, non-delivery of this saving has created an in-year budget pressure for which the service is seeking alternative savings to help manage.
Adult Services – Learning Disabilities	£1.1m	Savings totalling £2.4m are built into the council's contribution to the Adults with Care and Support Needs pool in 2019/20. Plans to implement these are progressing but savings are at risk of slipping or not being achievable and this has been included within the overspend reported for the pool.
Adult Services – Improvements to Acquired Brain Injury and Autism Pathway	£0.2m	
Adult Services – Commercial arrangements with care home providers	£1.0m	As reported above, the resulting in year budget pressure is partially offset by an increase in service user contributions within the Better Care Pool.

Communities - Parking Account Income	£0.5m	Additional income targets are not expected to be achieved. The resulting pressure is currently offset by other underspends within the Directorate.
Total Red Saving Plans	£5.1m	

The budget pressures arising from the non-delivery of savings form part of the Directorate positions reported above.

The budget proposals currently being developed for 2020/21 to 2023/24 to be considered by Council in February 2020 will include plans to address the impact of slippage and non-delivery of savings on future years.

Grants

RAG rating



Direction of travel

The council is expected to receive ringfenced and un-ringfenced government grants totalling **£341.7m** in 2019/20, an increase of £3.2m from the position reported last month. This relates to the following new ringfenced grants received; Teachers Pension grant (£2.9m), Staying Put Grant (£0.2m) and Extended Personal Adviser Duty Grant (£0.1m)

Strategic Measures

RAG rating



Direction of travel

The following table sets out average in-house cash balances and average rates of return for November 2019. The current forecast outturn position for in house interest receivable is **£3.3m**, which is **£0.9m** above budget due to higher than forecast cash balances.

Month	Average cash balance	Average rate of return
November	£407.14m	0.897%

External Fund dividends are paid quarterly. The forecast outturn position for external fund returns is **£3.8m**, which in line with budget.

Interest Payable is forecast to be in line with the budgeted figure of **£15.2m**.

Performance Indicator	Actual	Target
Average interest rate achieved in-house compared to treasury Management Budgeted Rate	0.92%	>=0.98%
Average Annualised Return achieved compared to Benchmark Rate* (Pooled Fund)	3.75%	>=3.75%

Debt and Loan Write Offs & Impairments

Indicators remain stable for collection of corporate income; days revenue outstanding, debt requiring impairment and debt over one year are all improved. The average collection rate for the year remains half a percentage point below last year and 1.5 below target; however, there were a low number raised in August and there are only 28 invoices not paid. Also, the collection rate for invoices with a value over £10,000 was in line with target.

Corporate Debtors



RAG rating



Direction of travel

Debt requiring impairment (DRI) has decreased marginally for the third month. The developer contribution debt, 35% of DRI and reported previously, remains outstanding and legal are working with the service to set out the Council's case, consequently the DRI is unlikely to reduce materially over the next quarter.

	Target	November 2019
Invoice collection rate	97.5%	95.9%
Avg. days outstanding	35	29
Debt requiring impairment	<£0.30m	£0.40m
Unsecure debt over 1 year	<£0.50m	£0.37m
Write offs as % of income Year to Date	<0.10%	0.01%

Debt and Loan Write Offs & Impairments

Both the invoice collection rate and days revenue outstanding continue to be stable with no material movement. Debt requiring impairment (DRI) has marginally increased, consequently is now £0.36m higher than the current impairment balance. Indications are that planned savings (£0.35m) linked to reducing DRI in 2019/20 will not be met, therefore there will be a pressure of £0.35-£0.68m. The final position is dependent on case resolutions in the final quarter.

- Adult Contribution to Care Charges

RAG rating



Direction of travel

There has been an increase in the number of complex high value cases, now 934. A vacant Debt Recovery officer post has been recruited to, as has a temporary post for 6 months to support tackling the high volume of cases. Delays due to outside influences such as housing market, Court of Protection and Probate office continue to be a factor delaying resolution of cases. Once the additional staff are in place in the new year, cases will be distributed to allow for targeted timely action.



	Target	November 2019
Invoice collection rate	92%	89.2%
Avg. days outstanding	100	105
Debt requiring impairment	<£2.00m	£2.99m
Unsecure debt over 1 year	<£1.60m	£3.18m
Write offs as % of income Year to Date	<1.0%	0.06%

Business Management Report
Position to the end of November 2019
Budget Monitoring



Directorate	BUDGET 2019/20			Outturn Forecast Year end Spend/Income	Projected Year end Variation to Budget	Projected Year end Variance Traffic Light
	Original Budget	Movement to Date	Latest Budget			
	£000	£000	£000	£000	underspend - overspend + £000	
Children						
Gross Expenditure	368,782	2,350	371,132	374,282	3,150	G
Gross Income	-255,037	1,820	-253,217	-253,217	0	G
	113,745	4,170	117,915	121,065	3,150	R
Resources						
Gross Expenditure	40,330	-162	40,168	40,302	134	G
Gross Income	-11,487	54	-11,433	-11,760	-327	R
	28,843	-108	28,735	28,542	-193	G
Communities						
Gross Expenditure	175,434	5,521	180,955	179,979	-976	G
Gross Income	-61,968	-5,840	-67,808	-66,858	950	R
	113,466	-319	113,147	113,121	-26	G
Adults						
Gross Expenditure	204,376	380	204,756	205,457	701	G
Gross Income	-20,349	-615	-20,964	-20,964	0	G
	184,027	-235	183,792	184,493	701	G
Public Health						
Gross Expenditure	29,950	0	29,950	29,950	0	G
Gross Income	-29,950	0	-29,950	-29,950	0	G
	0	0	0	0	0	G
Directorate Expenditure Total	818,872	8,088	826,960	829,969	3,009	G
Directorate Income Total	-378,791	-4,581	-383,372	-382,749	623	G
Directorate Total Net	440,081	3,507	443,588	447,220	3,632	G

Business Management Report
Position to the end of November 2019
Budget Monitoring

Directorate	BUDGET 2019/20			Outturn	Projected	Projected
	Original Budget	Movement to Date	Latest Budget	Forecast Year end Spend/Income	Year end Variation to Budget	Year end Variance Traffic Light
	£000	£000	£000	£000	underspend - overspend + £000	
Contributions to (+)/from (-)reserves	11,160		11,160	11,160	0	
Contribution to (+)/from(-) balances	-6,000	-290	-6,290	-6,147	143	
Public Health Saving Recharge	-250		-250	-250	0	
Transformaton Savings	-1,500	668	-832	-232	600	
Contingency	7,629	-3,389	4,240	785	-3,455	
Insurance	2,897		2,897	2,897	0	
Capital Financing	23,691		23,691	23,691	0	
Interest on Balances	-8,419		-8,419	-9,339	-920	
Strategic Measures Budget	29,208	-3,011	26,197	22,565	-3,632	
Unringfenced Government Grants	-18,743	-496	-19,239	-19,239	0	
Council Tax Surpluses	-7,306		-7,306	-7,306	0	
Revenue Support Grant	0		0	0	0	
Business Rates Top-Up	-39,896		-39,896	-39,896	0	
Business Rates From District Councils	-34,279		-34,279	-34,279	0	
Council Tax Requirement	369,065	0	369,065	369,065	0	

KEY TO TRAFFIC LIGHTS

Balanced Scorecard Type of Indicator

Budget	On track to be within +/- 1% of year end budget	 
	Estimated outturn showing variance in excess of +/- 1% of year end budget	

Business Management Report
Position to the end of November 2019
Budget Monitoring

Children Directorate	BUDGET 2019/20			Outturn Forecast Year end Spend/Income	Projected Year end Variation	Projected Year end Variance Traffic Light Indicator
	Original Budget	Movement to Date	Latest Estimate			
	£000	£000	£000	£000	underspend - overspend +	£000
CEF1 Education & Learning						
Gross Expenditure	79,259	1,751	81,010	81,610	600	G
Gross Income	-54,797	1,041	-53,756	-53,756	0	G
	24,462	2,792	27,254	27,854	600	R
CEF2 Children's Social Care						
Gross Expenditure	34,717	262	34,979	35,779	800	R
Gross Income	-3,352	118	-3,234	-3,234	0	G
	31,365	380	31,745	32,545	800	R
CEF3 Children's Social Care Countywide Services						
Gross Expenditure	55,690	2,158	57,848	59,598	1,750	R
Gross Income	-3,882	-356	-4,238	-4,238	0	G
	51,808	1,802	53,610	55,360	1,750	R
CEF4-1 Delegated Schools						
Gross Expenditure	154,133	-1,892	152,241	152,241	0	G
Gross Income	-154,133	1,892	-152,241	-152,241	0	G
	0	0	0	0	0	G
CEF4 Other Schools						
Gross Expenditure	38,570	874	39,444	39,444	0	G
Gross Income	-38,354	-875	-39,229	-39,229	0	G
	216	-1	216	216	0	G

Business Management Report
Position to the end of November 2019
Budget Monitoring

Children Directorate	BUDGET 2019/20			Outturn Forecast Year end Spend/Income	Projected Year end Variation	Projected Year end Variance Traffic Light Indicator
	Original Budget	Movement to Date	Latest Estimate			
	£000	£000	£000	£000	underspend - overspend + £000	
CEF5 Children's Services Central Costs						
Gross Expenditure	6,413	-803	5,610	5,610	0	G
Gross Income	-519	0	-519	-519	0	G
	5,894	-803	5,091	5,091	0	G
Directorate Expenditure Total	368,782	2,350	371,132	374,282	3,150	G
Directorate Income Total	-255,037	1,820	-253,217	-253,217	0	G
Directorate Total Net	113,745	4,170	117,915	121,065	3,150	R

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KEY TO TRAFFIC LIGHTS**Balanced Scorecard Type of Indicator**

Budget	On track to be within +/- 1% of year end budget	G
	Estimated outturn showing variance in excess of +/- 1% of year end budget	R

Business Management Report
Position to the end of November 2019
Budget Monitoring

Communities Directorate		BUDGET 2019/20			Outturn Forecast Year end Spend/Income	Projected Year end Variation	Projected Year end Variance Traffic Light Indicator
		Original Budget	Movement to Date	Latest Estimate			
		£000	£000	£000	£000	underspend - overspend + £000	
EE1	Planning & Place						
	Gross Expenditure	11,862	2,698	14,560	14,560	0	G
	Gross Income	-6,577	-2,760	-9,337	-9,337	0	G
		5,285	-62	5,223	5,223	0	G
EE2	Community Operations						
	Gross Expenditure	124,284	-14,007	110,278	109,302	-976	G
	Gross Income	-48,224	3,714	-44,510	-43,560	950	R
		76,060	-10,293	65,767	65,741	-26	G
EE3	Property & Investment						
	Gross Expenditure	12,822	16,526	29,348	29,348	0	G
	Gross Income	-4,324	-6,483	-10,807	-10,807	0	G
		8,498	10,043	18,541	18,541	0	G
EE4	Community Safety						
	Gross Expenditure	26,466	304	26,770	26,770	0	G
	Gross Income	-2,843	-311	-3,154	-3,154	0	G
		23,623	-7	23,616	23,616	0	G
Directorate Expenditure Total		175,434	5,521	180,955	179,979	-976	G
Directorate Income Total		-61,968	-5,840	-67,808	-66,858	950	R
Directorate Total Net		113,466	-319	113,147	113,121	-26	G

KEY TO TRAFFIC LIGHTS**Balanced Scorecard Type of Indicator**

Budget	On track to be within +/- 1% of year end budget	G
	Estimated outturn showing variance in excess of +/- 1% of year end budget	R

Business Management Report
Position to the end of November 2019
Budget Monitoring

Resources Directorate	BUDGET 2019/20			Outturn Forecast Year end Spend/Income	Projected Year end Variation	Projected Year end Variance Traffic Light Indicator
	Original Budget	Movement to Date	Latest Estimate			
	£000	£000	£000			
CEO1 Corporate Services						
Gross Expenditure	2,298	0	2,298	2,298	0	G
Gross Income	0	0	0	0	0	G
	2,298	0	2,298	2,298	0	G
CEO2 Law & Governance and Human Resources						
Gross Expenditure	11,223	-1,174	10,049	10,484	435	R
Gross Income	-5,070	-75	-5,145	-5,405	-260	R
	6,153	-1,249	4,904	5,079	175	R
CEO3 Corporate Finance & Internal Audit						
Gross Expenditure	7,388	2,232	9,620	9,859	239	R
Gross Income	-2,599	115	-2,484	-2,551	-67	R
	4,789	2,346	7,135	7,307	172	R
CEO4 Assistant Chief Executives						
Gross Expenditure	19,421	-1,220	18,201	17,661	-540	R
Gross Income	-3,818	15	-3,803	-3,803	0	G
	15,603	-1,205	14,398	13,858	-540	R
Directorate Expenditure Total	40,330	-162	40,168	40,302	134	G
Directorate Income Total	-11,487	54	-11,433	-11,760	-327	A
Directorate Total Net	28,843	-108	28,735	28,542	-193	G

KEY TO TRAFFIC LIGHTS

Balanced Scorecard Type of Indicator

Budget

On track to be within +/- 1% of year end budget

Estimated outturn showing variance in excess of +/- 1% of year end budget

G

R

Business Management Report
Position to the end of November 2019
Budget Monitoring

Adults Directorate	BUDGET 2019/20			Outturn Forecast Year end Spend/Income	Projected Year end Variation	Projected Year end Variance Traffic Light Indicator
	Original Budget	Movement to Date	Latest Estimate			
	£000	£000	£000	£000	underspend - overspend + £000	
SCS1 Adult Social Care						
Gross Expenditure	196,700	502,000.00	197,202	197,903	701	G
Gross Income	-18,999	-422,300.00	-19,421	-19,421	0	G
	177,701	79,700.00	177,781	178,482	701	G
SCS2 Joint Commissioning						
Gross Expenditure	7,676	-122,300.00	7,554	7,554	0	G
Gross Income	-1,350	-192,800.00	-1,543	-1,543	0	G
	6,326	-315,100.00	6,011	6,011	0	G
Directorate Expenditure Total	204,376	379,700.00	204,756	205,457	701	G
Directorate Income Total	-20,349	-615,100.00	-20,964	-20,964	0	G
Directorate Total Net	184,027	-235,400.00	183,792	184,493	701	G

KEY TO TRAFFIC LIGHTS

Balanced Scorecard Type of Indicator

Budget	On track to be within +/- 1% of year end budget	G
	Estimated outturn showing variance in excess of +/- 1% of year end budget	R

Business Management Report
Position to the end of November 2019
Budget Monitoring

Public Health Directorate	BUDGET 2019/20		Latest Estimate	Outturn Forecast Year end Spend/Income	Projected Year end Variation	Projected Year end Variance Traffic Light Indicator
	Original Budget	Movement to Date				
	£000	£000	£000	£000	underspend - overspend + £000	
PH1 LA Commissioning Responsibilities - Nationally Defined						
Gross Expenditure	16,352	1	16,353	15,728	-625	R
Gross Income	0	0	0	0	0	G
	16,352	1	16,353	15,728	-625	R
PH2 LA Commissioning Responsibilities - Locally Defined						
Gross Expenditure	12,965	0	12,965	13,065	100	G
Gross Income	-228	0	-228	-228	0	G
	12,737	-1	12,737	12,837	100	G
PH3 Public Health Recharges						
Gross Expenditure	633	0	633	633	0	G
Gross Income	0	0	0	0	0	G
	633	0	633	633	0	G
PH4 Grant Income						
Gross Expenditure	0	0	0	0	0	G
Gross Income	-29,722	0	-29,722	-29,722	0	G
	-29,722	0	-29,722	-29,722	0	G
Transfer to Public Health Reserve	0	0	0	525	525	G
Directorate Expenditure Total	29,950	0	29,950	29,950	0	G
Directorate Income Total	-29,950	0	-29,950	-29,950	0	G
Directorate Total Net	0	0	0	0	0	

KEY TO TRAFFIC LIGHTS**Balanced Scorecard Type of Indicator**

Budget

On track to be within +/- 1% of year end budget

Estimated outturn showing variance in excess of +/- 1% of year end budget

G

R

**Business Management Report
Position to the end of November 2019**

CABINET IS RECOMMENDED TO NOTE THE VIREMENTS AS DETAILED BELOW:

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	Jan	Nov	Additional Care Support & Brokerage Funding	CEF3-1	Corporate Parenting	T	52	0
				CEF5-1	Management & Admin	T	-52	0
				SCS2	Joint Commissioning	T	52	-52
			Allocation of 'Transformation other' savings	CEF5-1	Management & Admin	T	-163	0
				CEO2-1	Law & Governance	T	-11	0
				CEO2-2	Human Resources	T	-5	0
				CEO3	Finance & Procurement	T	-11	0
				CEO4-1	Policy	T	-8	0
				CEO4-2	ICT	T	-19	0
				CEO4-3	Customer Services	T	-6	0
				CEO4-4	Transformation	T	-2	0
				EE1-1	Planning & Place Management	T	-45	0
				EE2-1	Community Operations Management	T	-56	0
				EE3-3	Property, Investment & FM	T	-52	0
				SCS1-6	Other Funding	T	-86	0
				VSMMGT	Strategic Measures	T	464	0
				CEF	Jan	Nov	Agency Contingency Quarter 3	CEF2-1
CEF2-2	Social Care	T	191					0
EE	Jan	Nov	Misallocation of approved budget for Atrium replacement	EE3-2	Assets & Investments	T	100	0
				EE3-3	Property, Investment & FM	T	-100	0
			Waste Management Budget Tidy	EE1-4	Strategic Infrastructure & Planning	T	50	0
				EE2-4	Commissioning	T	-50	0
The budgets assigned to some of the G/L codes for cost centre M25000 no longer reflect anticipated spend or income amounts. The requested re-arrangement will be within the existing cost centre's overall annual budget	EE2-65	Heritage Service	P	-8	8			
SCS	Jan	Nov	BCF changes Oct-Nov	BCFPOOL	Better Care Fund Pool	P	1,482	-1,482
Grand Total							1,526	-1,526

Business Management Report - November 2019
Cabinet - 21 January 2020
Earmarked Reserves

	2019/20			Last reported forecast as at 31 March 2020	Change in closing balance to last forecast
	Balance at 1 April 2019	Movement	Forecast Balance at 31 March 2020		
	£000	£000	£000		
Schools' Reserves	17,309	-4,751	12,558	12,558	0
Vehicle and Equipment Reserve	2,901	-2,124	777	799	22
Grants and Contributions Reserve	14,704	-19,319	-4,615	-4,605	10
Government Initiatives	1,324	-451	873	632	-241
Trading Accounts	325	138	463	463	0
Council Elections	328	150	478	478	0
Partnership Reserves	2,659	-699	1,960	1,960	0
On Street Car Parking	1,997	250	2,247	2,247	0
Transformation Reserve	3,193	-526	2,667	2,211	-456
Demographic Risk Reserve	0	3,000	3,000	3,000	0
Youth Provision Reserve	0	500	500	500	0
Budget Prioritisation Reserve	4,890	-3,286	1,604	1,767	163
Insurance Reserve	10,647	-1,000	9,647	9,647	0
Business Rates Reserve	555	494	1,049	1,049	0
Capital Reserves	31,188	1,517	32,705	32,705	0
Budget Equalisation Reserve	280	-280	0	0	0
Redundancy Reserve	0	700	700	0	-700
Total Reserves	92,300	-25,687	66,613	65,411	-1,202

Commentary
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, primarily relating
This reserve is to fund future replacements of vehicles and equipment.
This reserve has been set up to hold unspent grants and contributions committed to be spent in future years. This includes the Dedicated Schools Grant and Public Health Grant
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.
This reserve holds funds relating to traded activities to help manage investment.
This will be used to fund future elections. In years where no County Elections take place any underspend on the Council Elections budget will be transferred to this reserve.
To be spent on OxLEP related project expenditure and the Growth Deal
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.
£1.0m allocated over 2019/20 and 2020/21 to provide seed funding for locality based youth provision
In light of the significant pressures relating to High Needs DSG and other budgets with demographic volatility. This reserve will help to manage demographic risk.
This reserve is needed to fund the implementation costs of the Council's Transformation programme.
This reserve is being used to support the implementation of the Council's priorities and the Medium Term Financial Plan.
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.
This reserve is to smooth the volatility of Business Rates income.
This reserve has been established for the purpose of financing capital expenditure in future years.
This reserve is being used to manage the cash flow implications of the variations to the Medium Term Financial Plan.
To be used to fund redundancy costs relating to the transformation programme.

Business Management Report - November 2019
Position to the end of November 2019
General Revenue Balances

Date	Forecast 2019/20		Budget 2019/20
	£m	£m	£m
General Balances: Outturn 2018/19	27.971		19.300
County Fund Balance		27.971	19.300
Planned Contribution to Balances			
Planned Contribution from Balances		-6.000	
Original forecast outturn position 2019/20		21.971	19.300
Additions			
		0.000	0.000
Calls on balances deducted			
Northfield School	-0.290		
		-0.290	
Automatic calls on/returns to balances			
		0.000	
Additional Strategic Measures			
Forecast Strategic Measures Overspend /Underpend			
		0.000	
Other items			
		0.000	
Net General Balances		21.681	19.300
Total Gross Expenditure Budget		793.111	797.065
Balances as a % of Gross Expenditure		2.73%	2.42%
Net Balances		21.681	
Calls on / returns to balances agreed but not actioned			
		0.000	
Calls on / returns to balances requested in this report			
		0.000	
Forecast Variation at Year End			
Add forecast underspend (as set out in Annex 1)		0.143	
Revised Outturn position		21.824	

Division(s): N/A

CABINET - 21 JANUARY 2020

PROPOSAL FOR COUNCIL TAX DISCOUNT SCHEME FOR CARE LEAVERS ACROSS OXFORDSHIRE DISTRICT COUNCILS AND OXFORDSHIRE COUNTY COUNCIL

Report by Hannah Farncombe Deputy Director Children's Social Care

RECOMMENDATIONS

1. Cabinet is asked to note the contents of a draft joint policy proposing to establish a joint Council Tax Discount Scheme for Care Leavers, and to request appropriate officers respond to it ahead of a final policy being taken to all Oxfordshire authorities' Executives for approval ahead of implementation on 1 April 2020;
2. Cabinet is Recommended to approve that:
 - (a) care Leavers are determined as a class for the purpose of Section 13A(1)(c) of The Local Government Finance Act 1992;
 - (b) all Oxfordshire Authorities and Thames Valley Police implement the Council Tax Discount Scheme for Care Leavers from 1 April 2020;
 - (c) all Oxfordshire Authorities and Thames Valley Police are signatories to a joint Memorandum of Understanding stating the joint commitment to the proposed scheme.

Executive Summary

3. This report is a draft proposed policy on establishing a joint Council Tax Discount Scheme for Care Leavers across Oxfordshire. The scheme is proposed to establish care leavers as a class for the purpose of Section 13A(1)(c) of The Local Government Finance Act 1992 and reduce their liability for council tax payments to nil between the ages of 18-21. Further arrangements on a case-by-case basis up to the age of 25 are proposed within the draft policy. A joint Memorandum of Understanding is also proposed and a draft is attached at Annex 1.

Background

4. The government made recommendations in its Care Leavers Strategy "Keep on Caring" published in July 2016, that local authorities should consider exempting care leavers from council tax, using their existing discretionary powers under Section 13a of the local Government Finance Act 1992.
5. Many councils have since introduced discounts for care leavers, including Oxfordshire's neighbours, the six Gloucestershire district councils (billing

authorities) and Gloucestershire County Council, who worked together to agree a common council tax discount scheme for Care Leavers from April 2019.

6. Oxfordshire County Council has worked to agree similar arrangements with Oxfordshire's five district councils and Thames Valley Police. This report is shared by all Oxfordshire council partners and will be used by each to request required approvals for the proposed scheme.
7. Discounts made using this power must be funded by the billing authority. Oxfordshire County Council and precept partners will accept their proportions of the financial liability, in the same proportions as the Council Tax Reduction Schemes (CTRS) that are already established in the five billing authorities: Oxford City Council, Cherwell District Council, West Oxfordshire District Council and South & Vale District Councils.

Key Issues

8. The proposed scheme will reduce any council tax liability to nil for those young people eligible.
9. The proposal is to implement the scheme jointly from 1 April 2020.
10. Care leavers aged 22-25 are proposed to be potentially eligible for council tax reduction under the proposed scheme, based on their individual circumstances and a letter of endorsement by their social worker/personal advisor.
11. Oxfordshire County Council remains responsible for supporting care leavers to access any council tax reductions they may be eligible for.
12. Oxfordshire County Council and precept partners will accept their proportions of the financial liability, in the same proportions as the Council Tax Reduction Schemes that are already established in the five billing authorities: Oxford City Council, Cherwell District Council, West Oxfordshire District Council and South Oxfordshire District Council and Vale of White Horse District Council.
13. As Thames Valley Police (TVP) is one of the major preceptors of council tax, the Police & Crime Commissioner has been approached and agreed to contribute proportionately to the cost of the proposed policy. The anticipated annual contribution is small but represents TVP's recognition of the needs of this vulnerable group and the importance of preventing homelessness.
14. Town and parish councils are also (minor) preceptors. As the financial impact of the policy on the major stakeholders is anticipated to be low, the expectation is that the impact on towns and parishes would be minimal. They have not been approached to contribute to the cost.

Equalities Implications

15. By its nature, the proposed policy addresses the disadvantage already existing to care leavers.
16. The policy is unable to guarantee that Oxfordshire's care leavers who are resident outside the county will be entitled to the equivalent discount in their local authority area. Oxfordshire County Council's Leaving Care Team will support these young people to access all their entitlements.

17. The policy will not apply to care leavers living in Oxfordshire, who are the statutory responsibility of other local authorities. Data on the numbers living in Oxfordshire is not available.

Risk Management

18. The risk of not agreeing the joint proposed scheme in time for the proposed implementation date of 1 April 2020 is a potential additional complexity in introducing the scheme midway through the financial year, rather than at the start. There is also potential reputational risk for any authority that has not approved the policy within the same timeframe as the others. Early programming-in of the proposed scheme to the authorities' Executives for formal decision is recommended to mitigate delays and therefore this risk.
19. Without confirmed accurate financial data from all authorities, there remains a minimal unquantified budgetary risk to authorities.
20. Failure to award the eligible discount could lead to a reputational risk for the authority(ies).

Legal Provision

21. Billing authorities have discretion under Section 13A(1)(c) of the Local Government Finance Act 1992 to reduce the amount of council tax payable for individuals, or for classes of council taxpayer. This includes the power to reduce the amount payable to nil.
22. This provision is separate to and distinct from the council tax support scheme which is made under Section 13A(1)(a) of the Local Government Finance Act 1992. It allows the council to reduce the amount payable after all statutory discounts and exemptions and local council tax support.

Eligibility Criteria

Oxfordshire County Council care leavers resident inside of Oxfordshire 18 - 21 year olds

- a) The care leaver discretionary discount will be awarded after statutory discounts, exemptions, disability discount and local council tax support have been applied. This will also include accounts where a care leaver is jointly and severally liable with others.
- b) The discount for care leavers aged 18-21 years old will ensure that any gap between their eligible discounts under their local authority's CTRS and the individual's liability for council tax will equate to 100% reduction, in all cases.

- c) A care leaver, for the purpose of this policy, is defined as a young person aged 18 – 21 who was formerly a child in the care of Oxfordshire County Council and then became a 'Former Relevant Child' as defined by The Children (Leaving Care) Act 2000. The care leaver must be resident and liable for council tax on a property within Oxfordshire.
- d) The care leaver must be the liable person for council tax, either solely or jointly and severally with other(s), at the dwelling in respect of which the application is made. The council tax bill must be in their name.
- e) Where a care leaver lives in a HMO or other property where they are not the council tax payer no discount will be awarded.
- f) The care leaver discount will apply to occupied properties only.
- g) Confirmation that a claimant is an Oxfordshire County Council Former Relevant Child must be received from Oxfordshire County Council's Leaving Care team.

22 - 25 year olds

- a) In the interests of young adults gradually progressing to full independence from 22 – 25 years of age, care leavers will be have no automatic discount applied additionally. However, where the individual's financial liability for council tax is judged to be difficult to manage due to their specific circumstances and/or vulnerabilities, a written endorsement by their personal advisor or social worker from Oxfordshire County Council, can be provided to justify the case for the S13A care leaver's discount to apply for the whole (or remainder) of that financial year.
- b) The discount will be subject to annual written statement and review, up to the individual's 25th birthday.

Oxfordshire County Council care leavers resident outside of Oxfordshire

- 23. It is proposed that where Oxfordshire care leavers are living outside the county, Oxfordshire County Council negotiates on a case-by-case basis for that individual's access to reductions or discounts. Advocating for the young person to gain complete reduction of council tax wherever possible has been implemented as standard practice within the personal advisor's role.

Application Process and Administration

- 24. Oxfordshire County Council's Leaving Care team will seek consent from care leavers to provide information confirming the name, address and date of birth of care leavers living in Oxfordshire who will qualify for the discount to billing authorities.

25. A care leaver discount may also be awarded where the following information is provided, and the care leaver status has been verified with Oxfordshire County Council's Leaving Care team.
- Full name;
 - Date of birth;
 - Current address;
 - Details of any other adults in the property and relationship to them;
 - Details of any circumstances that would be relevant to entitlement to legislative discounts, disregards or exemptions;
 - Contact details;
 - Name of Leaving Care personal advisor, if known.
26. Awards will be made directly by a discount in council tax liability and notification of the discount being awarded will be by way of the council tax bill.
27. The billing authority will undertake periodic reviews appropriate to the individual circumstances of each case.
28. The care leaver (or his/her appointee or a recognised third party acting on his/her behalf) must advise their billing authority of any change in circumstances which may affect entitlement to the discount within 21 days of the change occurring.
29. Any overpaid Care Leaver Discount will be reclaimed through the relevant council tax account and collected and recovered under the Council Tax (Administration and Enforcement) Regulations 1992.
30. It is Oxfordshire County Council's Leaving Care team's responsibility to support individual care leavers to access all their council tax reduction entitlements, with their consent.

Financial Implications for Billing Authorities

31. Local authorities are required to fund any section 13A discounts in full, however by local agreement Oxfordshire County Council commits to contribute to their share of discounts.
32. The cost of awarding care leaver discounts would depend both on the number of care leavers liable for council tax and their meeting the eligibility criteria.
33. The total indicative costs of the proposed scheme on Oxfordshire authorities will naturally vary from district to district.
34. At this stage only estimated data exists on how many care leavers might be expected to qualify for a discount. Although Oxfordshire County Council is currently responsible for over 400 care leavers, the proportion who are liable for council tax living in the county is low, due to:

- the range of placements which do not entail CT liability: family/friends; 'staying put' with foster carers; supported housing schemes; renting from landlords who are liable;
- their education, employment or training status which exempts them;
- having moved out of county.

35. An indicative estimate of the financial implication of this policy is shown below, based solely on council tax data and information shared by the district councils for 2018/19.

36. These figures are based on gross liability without any additional statutory discounts and/or exemptions and Council Tax Support which may be applicable. It is dependent on which band(s) of property the potential qualifying cases will be resident in as to how much it might cost the relevant district and Oxfordshire County Council. The financial impact is therefore expected to be minimal.

District	No. of Young People Liable for CT	CT post CTS awarded 2019/2020	County Liability	District Liability	Police	Town/Parish
SODC	9	£4,682.85	£3,652.62	£280.97	£515.11	£234.14
VOWH	7	£5,427.34	£4,233.33	£379.91	£597.01	£217.09
Cherwell DC	7	£913.26	£696.82	£61.19	£97.72	£54.80
WODC	5	£709.81	£561.36	£37.98	£78.84	£31.63
Oxford City	Est 8	£15,908.40 (max)	£11,756.31	£2,513.53	£1,654.47	£0.00
TOTAL	36	£27,641.66	£20,900.44	£3,273.58	£2,943.15	£537.66

i) Oxford City: Based on 5% having a liability taken from a random sample of 15% of the cohort of 160 YP. Calculated on band D.

ii) CT post-CTS awarded: assumed as liable for 100% of band D, but in practice are likely to be eligible for partial discount, which would bring this figure down.

iii) See Annex 1 for estimated split of council tax liability among authorities and preceptors.

37. Oxford City Council has a 100% liability for its Council Tax Reduction (CTR) Scheme. As such when young people/care leavers apply for financial assistance they have the whole liability included in their entitlement when determining their entitlement. As CTR is a means-tested benefit, there are instances when young people have income which is above the level which the government states that they need to live on. These people, which will be about 5% of Oxford City's caseload, need to make a contribution to their council tax charge from their income. The Care Leavers Discount will apply to this contribution.

38. Following a review of random case samples which was undertaken earlier this financial year by Oxford City Council, 95% of the cases it reviewed had 100% of their CTR liability paid, resulting in a zero bill. Not all young people in Oxford city's boundaries had a council tax charge as they were living with other adults in the home or there was no charge to be paid as the property was a house in multiple occupation of which the landlord is the liable party.

Budgetary Implications

39. Budgetary implications are anticipated to be low, based on the financial data provided currently by the district councils (which is indicative and based on a 'snapshot' of the current council tax records). This is because most young people who would be eligible for the proposed new scheme of discount, are already receiving reductions, sometimes of 100%, to their council tax liability.
40. The estimated cost to the county council has been built in to the budget for Children, Education & Families, from April 2020.

Review of Decision / Backdating

41. The Care Leaver Discount Scheme is administered in accordance with the Local Government Finance Act 1992 and is subject to a statutory appeals process. If the applicant disagrees with the decision, they must put this in writing giving their reasons. This should normally be received by the billing authority within a month of the date of the decision although more time can be given in exceptional circumstances.
42. If a decision is challenged a reconsideration will be made by the billing authority. The applicant will then be notified of the reconsideration which will clearly state the reasons for the decision made.
43. If the applicant remains dissatisfied with the decision, an appeal may be made to the independent Valuation Tribunal. Further details on this process will be notified to the applicant with the outcome of any previous review of the decision.
44. The billing authority will accept applications backdated to the beginning of the financial year, or to the date the care leaver became responsible for council tax so long as the date is not more than 12 months prior to the date of the application. The Care Leaver Discount cannot be awarded prior to 1 April 2020.

Communications

45. All Oxfordshire authorities are aware of and are agreed in principle to a proposed care leavers' discount across Oxfordshire.

Key Dates

46. Key dates for each authority will depend on their own processes for obtaining Executive decision to implement the policy. Implementation is proposed from 1 April 2020.

Joint Working

47. Working in partnership, revenue collection and benefits teams have identified and additional opportunities for further partnership working, including providing

information and advice to care leavers and support to Looked After Children using a more joined-up approach.

Sustainability Implications (Environmental Impacts – Reducing our Climate Impact)

48. There are no sustainability implications in the policy, or the operation/administration of the policy.

HANNAH FARNCOMBE

Deputy Director Children's Social Care

Contact Officer: Diane Cameron, Policy Officer, 07795 301254
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21 January 2020

Annex 1

Table of Estimated Financial Implications and Liability Split

District	No. of CT Accounts	No. in receipt of CTS	No. aged 18-21	No. aged 22+	CT Liability (pre-CTS) 2019/2020	CTS awarded 2019/2020	CT post CTS awarded 2019/2020	County Liability	District Liability	Police	Town/Parish
SODC	9	6	9	0	£11,030.31	£6,347.46	£4,682.85	£3,652.62	£280.97	£515.11	£234.14
VOWH	7	3	7	0	£7,843.58	£2,416.24	£5,427.34	£4,233.33	£379.91	£597.01	£217.09
Cherwell DC	7	4	4	3	£4,694.11	£3,780.85	£913.26	£696.82	£61.19	£97.72	£54.80
WODC	5	5	5	0	£5,364.75	£4,654.94	£709.81	£561.36	£37.98	£78.84	£31.63
Oxford City	Est 5%	Est 5%	8		£15,908.40		£15,908.40 (max)	£11,756.31	£2,513.53	£1,654.47	£0.00
TOTAL			33	3	£44,841.15	£17,199.49	£27,641.66	£20,900.44	£3,273.58	£2,943.15	£537.66

Oxford City: Based on 5% having a liability taken from a random sample of 15% of the cohort of 160 YP. Calculated on band D.

CT post-CTS awarded - assumed as liable for 100% of band D, but in practice are likely to be eligible for partial discount, which would bring this figure down.

Annex 2

COUNCIL TAX DISCOUNT SCHEME FOR CARE LEAVERS

MEMORANDUM OF UNDERSTANDING AMONGST COUNCIL TAX BILLING AUTHORITIES AND THE MAJOR PRECEPTORS

1. Oxfordshire councils (being Oxfordshire County Council and the five Oxfordshire district councils) understand that the transition out of care for young people can be very problematic. Without the support of a family and being inexperienced in managing their own finances, care leavers can be more susceptible to falling into debt. Therefore, each billing authority has agreed to give financial support to these young people by giving additional relief, on top of any other reliefs that may be available, to those leaving care by reducing their net liability for council tax to zero until they reach the age of 22 years, and in certain circumstances until age 25 years, with effect from 1 April 2020.

2. This document sets out the process by which Oxfordshire's care leavers will be given council tax relief, and how the costs of such relief will be shared amongst council tax billing and the major precepting authorities in Oxfordshire.

3. Under Section 13A(1-3) of the Local Government Finance Act 1992 (as amended), a billing authority has the power to reduce liability for Council Tax in relation to individual cases or class(es) of cases that it may determine. Essentially, it states: *Where a person is liable to pay council tax in respect of any chargeable dwelling and day, the billing authority for the area in which the dwelling is situated may reduce the amount which he is liable to pay as respects the dwelling and the day to such extent as it thinks fit.*

4. This also allows for a further reduction after a reduction under an existing council tax reduction scheme has been applied.

5. The power under paragraph 3 above includes:

- the power to reduce an amount to nil;
- that the power may be exercised in relation to particular cases or by determining a class of case in which liability is to be reduced to an extent provided by the determination.

6. There are financial implications for the billing authorities (being, in Oxfordshire, the five district councils) to awarding any discounts other than those currently available under the statutory legislation, and the financial burden of Section 13A discounts has to be met through an increase in the general level of council tax for other payers or from the general fund.

7. The major preceptors in Oxfordshire (Oxfordshire County Council, Thames Valley Police) also recognise:

- the granting of Section 13A discounts would reduce income from council tax;
- Council Tax Reduction Schemes exist to ensure that those on low incomes receive financial assistance with their council tax.

8. In order to provide further support for care leavers, billing authorities will create a new class of council tax charge payer known as 'Care Leavers' and will reduce the council tax bill for Oxfordshire's care leavers to zero, after any other reliefs (including any council tax reduction under the authority's scheme) have been applied.

9. This policy will apply up to and including the date of the day before the care leaver's 22nd birthday, and in certain circumstances as set out in the policy, may be applied up to and including the date of the day before the care leaver's 25th birthday.

10. Billing authorities will have the responsibility of undertaking appropriate checks on the eligibility of applicants for care leaver relief.

11. Reducing council tax in these circumstances will hereafter be known as an award of Care Leaver's Discount.

12. In recognition of the financial costs borne by billing authorities created by the policy and enabling mechanism described above, the major preceptors agree that they will reimburse an amount equivalent to their proportion of the reduction in council tax liability, as invoiced to them by each district on an annual basis. 'Their proportion' means the percentage calculated as the preceptor's band D tax divided by the total band D tax (billing authorities plus major preceptors) for the authority and the year concerned.

13. Billing authorities will inform major preceptors periodically as to the amount of Care Leavers' Discount awarded, and in particular where the volume of applications and awards is increasing significantly.

14. It is envisaged that this arrangement will continue on an ongoing basis. Where any party wishes to discontinue or change this arrangement it will endeavour to give other parties to this Memorandum of Understanding the maximum possible notice.

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Division(s): N/A

CABINET - 21 JANUARY 2020

Innovation & Sustainability Funds for Daytime Support

Report by Benedict Leigh, Deputy Director, Commissioning

RECOMMENDATIONS

Cabinet is RECOMMENDED to:

- (a) approve the recommendations, as set out under 28 (a-b);
- (b) approve the recommendation to transfer £40,138 from the Innovation Fund 2020/21 to the Sustainability Fund 2020/21, to cover the extra funding awarded, as set out under 28(c);
- (c) to carry forward the remaining balance of £39,430 from the Innovation Fund 2020/21 to the Innovation Fund 2021/22, as set out under 28 (d).

Executive Summary

1. The Innovation and Sustainability Funds were introduced in 2018, following the review of daytime support services and the implementation of a new, flexible countywide system of daytime support in Oxfordshire.
2. It was agreed at Cabinet on 19 March 2019 that a review of the Innovation and Sustainability Funds should take place. Information gathered from the review enabled us to make recommendations to improve grant applications, guidelines and the award selection and decision-making processes. These recommendations were presented and approved at Cabinet on 16 July 2019.
3. This round of applications to the Innovation and Sustainability Funds opened on 12 August 2019 and the closing date for both funds was originally 20 September 2019. However, an unprecedented number of requests to extend the deadline resulted in an extension of the closing date to 30 September 2019.
4. The Sustainability Fund for 2020/21 is £250,000 and we received 38 applications to this fund, requesting an overall amount of £370,634.30, with 30 applicants requesting funding over the 3-year period.
5. The Innovation Fund for 2020/21 is £123,265, and we received 5 applications to this fund, requesting an overall amount of £63,097.00.
6. The strategic plan is to move towards a rolling three-year programme of awards for the Sustainability Fund, whereby a third of the available funding is awarded each year to applicants requesting funding over a three-year period.

Background

7. In 2017 the Council developed a sustainable model for delivering daytime support to meet people's needs now and in the future. This includes: supporting people to live well in their communities; providing some additional tailored support to people who need this; and ensuring that a range of options are available for people with more complex needs to choose from, using their personal budgets or own resources.
8. There remained a need to continue to support people to live well in their local community, taking part in a range of locally available opportunities. Our aim was to reduce loneliness and social isolation by supporting individuals and communities to support each other.
9. Oxfordshire's voluntary sector delivers excellent support to many vulnerable people; and the majority do so without funding from Oxfordshire County Council. As part of the outcomes from the daytime support review, the Council introduced Voluntary Sector Funding. The January 2017 Cabinet report included the below table, showing budgeted funding for the Innovation and Sustainability Funds:

Service	17/18	18/19	19/20
Voluntary Sector Funding (April – August 2017)	£0.573m	-	-
Sustainability Fund (Voluntary Sector funding)	-	£0.250m	£0.250m
Innovation Fund (Voluntary Sector Funding)	£0.100m	£0.100m	£0.100m
Specialist training & support (dementia & autism)	£0.025m	£0.025m	£0.025m
Community Information Network	£0.250m	£0.250m	£0.250m

- The **Sustainability Fund**, £250,000 per year, to provide grants to enable the ongoing delivery of daytime support services in areas of high need. The fund was open to all voluntary and community groups supporting people in Oxfordshire.
- The **Innovation Fund**, £100,000 per year, to provide one-off grant funding to establish self-sustaining projects to fill gaps in services and broaden the current offer. The fund was open to all voluntary and community groups supporting people in Oxfordshire.
- Alongside these funds, there was a further £250,000 available in the **Transition Fund** for 2018/19. This enabled additional support to assist services towards sustainability in 2017/18.

Innovation and Sustainability Funds review 2019

10. It was agreed by Cabinet on 19 March 2019 that a review should take place for successful applicants to establish success rates and where smaller amounts are awarded, any implications to the projects.
11. In April and May 2019, we reviewed the Innovation and Sustainability Funds process, application forms and guidance & criteria, with the involvement, support and co-design of people across Oxfordshire. This included service users, carers, support workers, service providers and organisations with an interest or connection to daytime support services.
12. We sought feedback and suggestions from the cross-party panel participants and representatives from internal teams involved in the Innovation and Sustainability Funds process.
13. The third round of the Innovation Fund 2019/20 was oversubscribed and resulted in a decision to award 60% of the requested amounts to all applicants except for one bid, where costs were item specific and a one-off amount. Feedback from this cohort indicated that offering a percentage had not been a viable option for three of the successful applicants, and they declined the awarded amounts, totalling an amount of £23,265. Several other applicants did accept the reduced amounts, but they had to revise their offer, which resulted in a scaled down version of the original idea being offered throughout the funding period.
14. Final recommendations on how we could improve the process, simplify and re-word the application forms and streamline specific tasks were presented to Cabinet on 16 July 2019 for their final decision. All recommendations were agreed by Cabinet.

Outcomes from the Innovation & Sustainability Funds review

15. To introduce the option to apply for funding over a 3-year period for the Sustainability Fund applicants, phased in over a 3-year period and in due course replacing the 1-year period. This option has been implemented for the Sustainability Fund 2020/21 applicants.
16. People had requested a workshop where they could discuss the grant criteria in more detail and look at examples of a 3-year business plan. We arranged two workshops, in partnership with Oxfordshire Community & Voluntary Action, and held them at the beginning of September 2019. Both workshops proved very popular, with people expressing how helpful and informative the workshops have been.
17. Cabinet agreed on 16 July 2019 that we could reallocate £23,265 from the Innovation Fund 2019/20, previously awarded and declined, to the next round of the Innovation Fund.

Process

18. The Innovation and Sustainability Funds opened for applications on 12 August 2019 and the closing date for both funds was 20 September 2019. We received an unprecedented number of requests to extend the deadline this time, which resulted in an extension date to 30 September 2019.
19. Officers used a pre-scoring process for all applications, which included checking that each application met the grant criteria, collating background information and providing an accreditation check. This information was used to produce a summary sheet for each application, which was shared with all representatives at the cross-party panel, forming part of a synopsis and easy to read document. This was used alongside the application form and any other supporting documents.
20. Applications to the Innovation Fund were shared with a representative from the Innovation Team to ensure that we (OCC) were not duplicating projects and funding.
21. Cross party panel meetings comprised of Cllr Lawrie Stratford, Cllr Mark Gray, Cllr Sobia Afridi and Cllr Richard Webber, as well as representation from people using services, and were held on 8 and 10 October 2019 to evaluate applications and make recommendations to Cabinet for award. The cross-party panel assessed all applications to the Innovation and Sustainability Funds against the criteria outlined in the guidance notes at Annex 1.
22. Applicants, along with their local county councillor, will be notified by e-mail of the Cabinet decision. Applicants will be notified of the decision by the end of January 2020.

Budgets and Applications

23. Funding of £250,000 per annum is available through the Sustainability Fund from 2020/21 to 2022/23. We received 38 applications to this fund, requesting an overall amount of £370,634.30 in 2020/21. 30 applicants applied for funding over the 3-year period with further total requests of £282,499 in 2021/22 and £248,200 in 2022/23.
24. The Innovation Fund totals £123,265 in 2020/21, and we received 5 applications to this fund, requesting an overall amount of £63,097.00 in 2020/21.
25. The individual amounts requested to the Innovation and Sustainability Funds, and the subsequent cross-party panel recommendations can be found at Annex 2 and Annex 3.

Recommendations from cross-party panel

26. The cross-party panel recommendations are:
- a) To award a total of £43,697 from the Innovation Fund in 2020/21. Details can be found at Annex 2.
 - b) To award a total of £290,138 from the Sustainability Fund in 2020/21, £160,545 in 2021/22 and £135,665 in 2022/23. Details can be found at Annex 3.
 - c) To transfer £40,138 from the Innovation Fund 2020/21 to the Sustainability Fund 2020/21, to cover the extra amounts awarded.
 - d) To carry forward the remaining balance of £39,430 from the Innovation Fund 2020/21 to the Innovation Fund 2021/22.

Equalities Implications

27. The equality and inclusion implications of the strategic direction for daytime support and its implementation were set out in the 24 January 2017 Cabinet papers. This included a Service and Community Impact Assessment. These papers are available at Annex 4.
28. Equality and inclusion implications have been considered. The proposal to offer grants to community and voluntary sector services is only thought to confer a benefit on those with a protected characteristic and there is no adverse impact on those individuals.
29. The criteria for grant funding will require services to demonstrate how they meet the 'need' criteria, which are included as Annex 1, which includes consideration of impact. This will also be considered in the decision processes.

Climate Implication

30. As part of the grant review, all applications are now submitted and processed electronically. We have minimised the need to print applications and encouraged the use of electronic access and assessment for those taking participating in the cross-party panel meetings.

Risk Management

31. The risk management implications of the strategic direction for daytime support and its implementation were set out in the 24 January 2017 Cabinet papers. These papers are available on the council website.

Communications

32. The process and criteria for applying to the Innovation and Sustainability Funds has been communicated via the council website as well as through multiple email communications with stakeholders and partners to encourage applications and wider distribution.

- 33. We have publicised good news stories based on several successful applicants from previous rounds of the Innovation and Sustainability Funds.
- 34. All organisations that have submitted applications to the Innovation & Sustainability Funds will be informed of the outcome by email communication on 28 January 2020.

Key Dates

- 35. The key date is as follows:

January 28, 2020	Communication to all applicants on final decisions made at Cabinet
April 1, 2020	Allocation of funding

Documents

- Annex 1 Innovation & Sustainability Fund guidance and criteria
- Annex 2 Innovation Fund requested amounts and recommendations
- Annex 3 Sustainability Fund requested amounts and recommendations
- Annex 4 Cabinet papers 24 January 2017

Report by: Rachel Pirie – Lead for Older People Commissioning & Markets
 Contact Officer: Rebecca Lanchbury – Senior Commissioning Officer
rebecca.lanchbury@oxfordshire.gov.uk 07584 481 255 January 2020.

Community and Voluntary Sector Daytime Support Innovation & Sustainability Funds 2020/21 Grant Guidance & Criteria

Introduction

Daytime support is an important part of the lives of many people, providing vital links to communities and helping people to live independent and fulfilling lives.

As demand for social care grows and government funding reduces, we need to make sure that the support available for people meets varied and changing needs; is fit for the future and sustainable over the longer term.

There are over 200 community and voluntary sector daytime support opportunities for people aged 18 and over across the county providing excellent support to people, and the majority do so without county council funding.

We want to ensure that there is choice between a range of different opportunities, which can meet a wide variety of needs for care and support. We aim to increase choice with the Innovation Fund, which will offer one-off grants to self-sustaining enterprises to create additional daytime opportunities and the Sustainability Fund, which will support the continuation and development of existing daytime opportunities in Oxfordshire.

What do we mean by Innovation?

The intention of the Innovation Fund is to support new and innovative ideas which would create additional daytime opportunities for people in Oxfordshire or create a daytime opportunity in an area where the service does not already exist (to fill a gap to meet specific needs).

The fund is available for existing and new organisations, including individuals, in the process of setting up a new service, or a new aspect to an existing service which will create additional daytime support opportunities.

The term 'daytime opportunities' includes any proposed activity which may take place during the day and/or evening.

What do we mean by Sustainability?

We realise that many voluntary and community services have gone on to become self-sustaining (no longer requiring funding from Oxfordshire County Council), as they have found alternative ways to generate an income and raise funds to enable the service to develop and continue. However, we understand that this hasn't been possible for all services, and that some may still require a funding contribution to support their plans of becoming self-sustaining; meaning that they are exploring alternative options to raise funds and cover the day to day running costs of the

service they provide thus reducing their dependence on Oxfordshire County Council funding, but they have not yet achieved this or are unlikely to achieve total independence.

There is no limit to how many times you can apply to the Sustainability Fund, but it is expected that the amount requested each year will be less than the amount requested for the previous year, unless there are unforeseen or one-off costs which wouldn't have been included in your business plan.

Grant Funds for 2020/21

The Innovation Fund

The Innovation Fund is open to all voluntary and community groups supporting people in Oxfordshire. The total amount of the Innovation Fund for 2020/21 is **£100,000**.

This fund will provide one-off funding to support the development of self-sustaining projects, delivering new and innovative opportunities for adults in Oxfordshire.

Innovation eligibility criteria

The **Innovation Fund** budget and scope was agreed by the council in January 2017 as part of the overall changes to daytime support. The scope of the fund is to support innovative, self-sustaining initiatives which meet gaps and broaden the current offer for daytime support opportunities.

The following criteria and application process have been developed and recently reviewed following discussion with a group of day opportunities providers, local community & voluntary sector organisations, the Community Information Network (provided by Age UK), Oxfordshire Community & Voluntary Action and a range of people across Oxfordshire. These criteria provide some additional guidance on the already agreed scope of innovative, self-sustaining initiatives meeting gaps and broadening the offer.

Please consider the following criteria in making an application:

These funds are open to applications from community and voluntary sector organisations, including existing organisations and organisations in the process of setting up. The fund is intended to provide **financial support to enable innovation**.

Bids will need to demonstrate that they are offering a **new service that is based on the changing needs of people** and how they want to see different opportunities available to them, which will support them in living a full and varied life. In the case of this fund, it is expected that initiatives will support **adults in Oxfordshire** with social contact; getting out of the house; maintaining independence; seeing friends; and meeting expressed needs.

Organisations wishing to bid will need to demonstrate how they know that there is a **need for this new and innovative idea in their local community** and what is already available. For an existing service with a new and different aspect, they will need to demonstrate where the need has come from and how it is different to what is currently being offered.

Bids are welcome from individuals with an innovative idea which will create a service offer for additional daytime opportunities.

Please be aware that costs associated with the recruitment of a person specifically raising funds for your service, will not meet the criteria of the Innovation Fund, unless the application clearly demonstrates how the increased costs associated with this will be met from increased fundraised income in a sustainable manner.

We will assess applications according to the following:

1. The need for the service, including:

- The benefits that it will offer people (adults in Oxfordshire)
- The gap in existing services that this service will help to fill by offering a new service, or a new aspect to an existing service able to create additional daytime support opportunities
- How it will link to other services already available in the community to enhance the support available
- How the service will add value to the local community

2. The need for our financial support, including:

- The service is providing support in an area where similar services are not currently available
- The service will demonstrate value for money
- There is clear information regarding what the innovation fund will cover, which may include set up costs.
- There are 3-year sustainability and business plans in place to fund the service on an ongoing basis.
- Why funding is needed to set this up

3. An innovative approach to supporting people in their communities:

- For example, trialling something that hasn't been tried before

The Sustainability Fund

The Sustainability Fund is open to all voluntary and community groups supporting people in Oxfordshire. The total amount of the Sustainability Fund for 2020/21 is **£250,000**.

The fund can provide a contribution which can be used to support existing services to continue to operate and offer daytime support opportunities.

Sustainability eligibility criteria

These funds are open to applications from community and voluntary sector organisations providing daytime support services. We want to support these services to continue to exist, flourish and develop across Oxfordshire.

These **daytime support services** support people to **live well** in their **local communities**. They need to **offer what people have told us they need** from daytime support. In the case of these services, this is mostly: social contact; getting out of the house; maintaining independence; seeing friends; having a meal. Many of these services also provide a much-valued break for carers.

Please be aware that costs associated with the recruitment of a person specifically raising funds for your service, will not meet the criteria of the Sustainability Fund, unless the application clearly demonstrates how the increased costs associated with this will be met from increased fundraised income in a sustainable manner.

We will judge applications according to both:

4. The **need for the service**, including

- The increased risk of multiple deprivation to local people, with limited alternative opportunities for daytime support available in the area
- The increased risk of loneliness and isolation to local people, emphasising the increased need for daytime support opportunities in this area

The **need for our financial support**, including:

- The service is providing support in an area/to people at risk of multiple deprivation, and is unable to become completely self-sustaining, having reached its maximum potential for self-sustainability.

- The service is already good value for money, largely volunteer-run and raises some income through fundraising, but there remain expenses which it cannot cover without this funding.
- Where possible, the service can demonstrate that they have taken steps to maximise self-sustaining options available to them.
- There is clear information regarding what the sustainability fund will cover, which may include one off costs
- There is a 3-year business plan in place to support funding the service on an ongoing basis.

Support available

Oxfordshire Community & Voluntary Action (OCVA) is available to provide support to organisations wishing to bid for innovation or sustainability funding, and to provide advice and information on alternative funding opportunities.

OCVA, in partnership with other Oxfordshire organisations, provides a wide range of support, including promoting and developing volunteering, supporting voluntary and community organisations to increase their effectiveness and build their capacity, and facilitating networking and partnership-working.

To contact them for support, please see: www.ocva.org.uk
 Email: admin@ocva.org.uk
 Tel: 01865 251946

The Community Information Network (CIN) provides information on local support services and activities. They have knowledge of what is currently available and where there may be gaps and opportunities for partnership working. They have been working with communities to help them to develop new opportunities. Their online directory holds details of a wide range of opportunities available, searchable by area.

To contact them for information, please see:
www.ageuk.org.uk/oxfordshire/our-services/community-information-network/
 Email: network@ageukoxfordshire.org.uk
 Phone: 0345 450 1276

The Application Process - key dates

- **12th August 2019** - The Sustainability Fund opens
- **3rd and 5th September 2019** - Applicant workshops
- **12 noon on Friday 20th September 2019** – closing date
- **23rd & 24th September 2019** - Officer scoring process

Annex 1
 Innovation & Sustainability Funds
 September 2019

- **8th and 10th October 2019** - cross party panel meetings – details below
- **17th December 2019** - Applicants notified of recommendations
- **21st January 2020** - County Council Cabinet, for final decision
- **28th January 2020** - Applicants notified of final decisions
- **From 1st April 2020** - Payments to successful applicants

We encourage applicants to contact us early with their expressions of interest or any questions they might have.

We require all application forms to be submitted electronically, unless agreement has been sought for alternatives prior to the closing date.

Please complete and submit this application form electronically, along with your most recently available, year-end accounts and 3-year business plan by **12 noon on Friday 20th September 2019**.

How will applications be assessed?

Officers will carry out a scoring process for all applications to the Innovation and Sustainability Funds, using the criteria set out in the relevant fund against the responses to the questions within the application form.

All applications meeting the criteria will be assessed at the cross-party panel, supported by officers and consisting of members, service users and carers, where innovation fund applicants may be offered the opportunity to present their idea, should they feel that it is helpful to their bid. The cross-party panel will make recommendations for award.

These recommendations will be presented at Cabinet, for final decision, on 21st January, and the decisions will become effective 7 days after the Cabinet date, which will be 28th January 2020.

Awarding the grant

Successful applicants will be asked to sign a legal agreement with the council. Once the legal agreement is signed, we will then transfer the funding into the organisation's bank account on or just after 1st April 2020.

Unsuccessful applicants will be offered feedback on their proposal and, where possible, we will work with organisations to help them identify alternative funding opportunities.

Monitoring

Successful applicants are expected to comply fully with any monitoring requests from the Council and must agree to this when signing the funding request form.

All successful applicants need to be prepared for a review of their project during the period of funding (1st April 2020 – 31st March 2021)

This may include:

- Receipts recording how the money was spent
- Reports on the activity funded
- Feedback from individuals impacted
- Any other record of the activity funded (e.g. promotional flyers and posters)

Successful applicants will need to complete a monitoring report towards the end of the funding agreement. A copy of the monitoring report will be sent out with the signed grant agreement, at the beginning of the funding period.

Any unspent grant funding will be recovered by the county council.

Contacting Us

If you have any queries about the **Daytime Support Grant Funds** or the application process, please contact us:

Email: contracts.admin@oxfordshire.gov.uk

OR

Email: rebecca.lanchbury@oxfordshire.gov.uk

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CA9
Innovation Fund 2020/21
Application amounts requested and cross-party panel recommendation amounts
Annex 2

Group/Service/Club	Requested Amounts	Recommended Amounts
Daybreak	£11,400	£0.00
Jewinswomen2women Ltd	£19,760	£19,760
Keen INK	£9,947	£9,947
Oxfordshire Chinese Community & Advice Centre	£15,000	£7,000
The Porch	£6,990	£6,990
Amounts	£63.097	£43,697

Available amount 20/21	£123,265
Innovation Spend 20/21	£43,697
Transfer to Sustainability overspend 20/21	£40,138
Balance to carry forward to 2021/22	£39,430

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CA9
Sustainability Fund 2020/21
Application amounts and cross-party panel recommendation amounts
Annex 3

Group/Service/Club	Requested Amounts			Recommended Amounts		
	Year 1	Year 2	Year 3	20/21	21/22	22/23
Age Concern Chalgrove	£15,000	£15,000	£15,000	£8,750	£7,000	£6,000
Age UK	£24,959	£25,363	£25,768	£0	£0	£0
Aspire Oxford	£10,000	£9,000	£8,000	£10,000	£9,000	£8,000
Banburyshire	£8,319	£15,000	£15,000	£8,319	£0	£0
Berinsfield Day Centre	£10,000	£9,000	£8,000	£10,000	£9,000	£8,000
Bookfeast	£5,000			£5,000		
Bromsgrove Day Centre	£4,500	£4,000	£3,500	£4,500	£4,000	£3,500
Carterton Day Centre	£10,000	£5,000	£5,000	£10,000	£5,000	£5,000
Charlbury Day Centre	£4,600	£4,000	£3,600	£4,600	£4,000	£3,600
Cholsey Day Centre	£2,397			£2,397		
Daybreak	£41,584	£42,241	£42,912	£30,000	£27,000	£24,000
Enrych	£15,000	£15,000	£5,000	£15,000	£0	£0
Eynsham Day Centre	£4,000			£4,000		
Farcycles	£4,850	£4,125	£3,470	£4,850	£4,125	£3,470
Forget Me Not	£9,750			£9,750		
Green Pastures	£1,032	£770	£545	£1,032	£770	£545
Happy Place -Older People Chinese Centre	£7,500	£7,000	£6,500	£5,000	£0	£0
Kennington Memory Club	£3,000	£2,000	£1,000	£3,000	£2,000	£1,000
Marston Gardening Community	£5,000	£4,000	£3,000	£5,000	£4,000	£3,000
My Life My Choice	£15,000	£12,000	£9,000	£15,000	£12,000	£9,000
October Club	£12,000	£11,000	£10,000	£12,000	£11,000	£10,000
Oxfordshire Association for the Blind	£15,000	£10,000	£5,000	£15,000	£10,000	£5,000
Oxfordshire Chinese Community Advice Centre	£15,000	£14,000	£13,000	£7,000	£0	£0
Oxfordshire Volunteer Befriending Club	£9,750	£9,250	£8,750	£9,750	£9,250	£8,750

CA9
Sustainability Fund 2020/21
Application amounts and cross-party panel recommendation amounts
Annex 3

RVS - Cornhill	£15,000			£10,945		
RVS - West Way Services	£10,000			£5,000		
St Mary's Thursday Club - Bloxham	£3,000	£2,750	£2,500	£3,000	£2,750	£2,500
Stonehill Gardening Club	£4,800	£2,400	£1,200	£4,800	£0	£0
Stonesfield Lunch Club	£5,000	£4,500	£4,000	£4,000	£3,500	£3,000
Syrian Community	£12,555	£10,950	£8,955	£5,500	£0	£0
Thame & District Day Centre	£20,000	£18,000	£16,000	£12,000	£10,000	£8,000
The Cedar Community Club	£15,000	£13,000	£11,000	£15,000	£13,000	£11,000
The Chinnor Village Centre	£8,000			£6,000		
The Cluster Care Group	£2,500	£2,500	£2,000	£2,500	£2,500	£2,000
Volunteer Link Up	£4,975.30	£4,750	£4,700	£4,975	£4,750	£4,500
Witney Day Centre	£7,500			£7,407		
Wychwoods Day Centre	£4,063	£1,000	£1,000	£4,063	£1,000	£1,000
Young Dementia	£5,000	£4,900	£4,800	£5,000	£4,900	£4,800
Amounts	£370,634.30	£282,499	£248,200	£290,138	£160,545	£135,665

Sustainability 2020/21 amount available	£250,000
Amount recommended 20/21	£290,138
Underspend to be transferred from the Innovation Fund 20/21	£40,138

Service and Community Impact Assessment (SCIA)

Front Sheet:

Directorate and Service Area:

Social and Community Services, Joint Commissioning

What is being assessed:

Proposed options for daytime support

Responsible owner / senior officer:

Benedict Leigh, Lead Commissioner, Adults

Date of assessment:

October 2016, updated January 2017 following public consultation

Summary of judgement:

In developing our understanding of the needs for daytime support in Oxfordshire we listened to over 600 people who use daytime support, their carers, as well as providers of care and support, and community groups. People told us their priorities, and we took these into account in developing a new, sustainable model for daytime support. We have now consulted on this model and options for delivering it and over 1000 people have shared their views. This assessment is of the recommended way forward.

There are potential positive impacts of the proposed model, enabling a daytime support offer which is sustainable and fit for the future in a challenging financial context. It introduces support for the development of new opportunities, offers a more flexible council-provided service, providing a range of support options to meet different needs as well as directly delivering transport to people who are eligible for this support.

There are potential negative impacts for some people with daytime support needs and their carers resulting from a reduction in funding for community and voluntary support and associated transport, and the replacement of council-provided Health and Wellbeing Centres and Learning Disability Daytime Support Services with a new countywide, flexible Community Support Service.

This is particularly likely to impact on people with the protected characteristics relating to age, disability, gender and ethnicity. However, the model includes a number of mitigations to this, including support and sustainability funding for community and voluntary services, and personalised transition support for people who are affected by the changes.

This is also reflected in mitigating the potential impacts on providers; we will offer support to enable community and voluntary provided daytime support services to transition to more self-sustaining models, as well as funding to those that are in areas of greatest need. We anticipate potential negative impacts for some staff,

particularly in the council's daytime support services. We will mitigate this through a staff consultation process, alongside staff support.

Detail of Assessment:

Purpose of assessment:

This assessment considers the impact of the proposed model for daytime support in Oxfordshire. The assessment considers the possible impact on the local population, whether this could impact differently on specific groups, and how the impact could be mitigated.

This assessment considers the possible impact of the recommended model, which has been amended in light of feedback received during the public consultation. The full results of the consultation are set out in the Consultation Report, and the recommended model in response is set out in the associated Cabinet paper.

This assessment also fulfils the council's requirements under Section 149 of the Equalities Act 2010, as set out below:

Section 149 of the Equalities Act 2010 ("the 2010 Act") imposes a duty on the Council to give due regard to three needs in exercising its functions. This proposal is such a function. The three needs are:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic, and those who do not.

Complying with section 149 may involve treating some people more favourably than others, but only to the extent that that does not amount to conduct which is otherwise unlawful under the new Act.

The need to advance equality of opportunity involves having due regard to the need to:

- remove or minimise disadvantages which are connected to a relevant protected characteristic and which are suffered by persons who share that characteristic,
- take steps to meet the needs of persons who share a relevant protected characteristic and which are different from the needs other people, and
- encourage those who share a relevant characteristic to take part in public life or in any other activity in which participation by such people is disproportionately low.
- take steps to meet the needs of disabled people which are different from the needs of people who are not disabled and include steps to take account of a person's disabilities.

The need to foster good relations between different groups involves having due regard to the need to tackle prejudice and promote understanding.

These protected characteristics are:

- age
- disability
- gender reassignment
- pregnancy and maternity
- race – this includes ethnic or national origins, colour or nationality
- religion or belief – this includes lack of belief
- sex
- sexual orientation
- marriage and civil partnership

Social Value

Under the Public Services (Social Value Act) 2012 the Council also has an obligation to consider how the procurement of services contracts with a life value of more than £173,934¹ might improve the economic, social, and environmental well-being of the area affected by the proposed contract, and how it might act to secure this improvement. However, it is best practice to consider social value for all types of contracts, service delivery decisions and new/updated policies. In this context, 'policy' is a general term that could include a strategy, project or contract.

Context / Background:

We carried out a review of daytime support for people aged over 18 in Oxfordshire. The review focused on understanding the needs of vulnerable people for daytime support, specifically support to meet eligible care needs and support that prevents care needs escalating.

The review started in March 2016 and involved engagement work with more than 600 people currently using services, and their carers. It also involved detailed modelling work and appraisal of a range of options.

It covered voluntary and community provided daytime support, health and wellbeing centres, learning disability daytime support services, and the associated transport arrangements. This review was linked to: the review of respite services and the Oxfordshire carers' strategy and carers' personal budgets review.

The purpose of the review was to:

- Identify the needs of the population of Oxfordshire for daytime support
- Describe Oxfordshire County Council's aims in relation to daytime support
- Propose a model and options for future daytime support that meet the council's aims, statutory needs and are in the context of the current financial resources

¹ [EC Procurement Threshold for Services](#)

The public consultation on the proposals resulting from the review, took place in autumn 2016. Over 1000 people responded, sharing their views on the proposed options and their potential impact. Further information is available in the associated Consultation Report. The recommended way forward in response, is set out in the associated Cabinet paper. Further detail on our response to points raised during the consultation is set out in the Response to the Consultation. This assessment is of the recommended way forward.

Proposals:

Personal budgets for everyone with eligible needs enabling choice between a range of voluntary sector, private sector, and county council services.

Open access tailored support for more vulnerable people delivered through the Dementia Support Service, which will continue to provide support to people with dementia and their families through Dementia Advisors, and the Wellbeing and Employment Service, which will continue to provide support to people aged over 18 with learning disabilities, autism and physical disabilities.

Supporting people to **live well in the community** through: information and advice; council services such our bookable transport service, The Comet; and voluntary and community sector support. This includes grant funding – an Innovation Fund for the development of self-sustaining projects, and a Sustainability Fund for the ongoing delivery of targeted daytime support opportunities in areas of high need in the county; and other support including advice and support to develop self-sustaining models, and support to develop Good Neighbourhood Schemes.

A **council-provided**, countywide, flexible **Community Support Service**, which people can choose to purchase using Personal Budgets or self-fund. This service would replace our Health and Wellbeing Centres and Learning Disability Daytime support Services. It will support people with a wide range of needs for daytime support, including older people, people with learning disabilities, people with physical disabilities and people with dementia. It will provide transport integral to the service, to people eligible for transport support. It will be delivered from 8 buildings, in Oxford, Banbury, Didcot, Witney, Bicester, Wantage, Abingdon and Wallingford. These will provide multi-functional spaces, and deliver individual and group support, using facilities available at the base as well as in local communities.

Further information on this proposed model of daytime support, including costs, is available in the Cabinet paper.

Evidence / Intelligence

The public consultation launched on 1 November 2016 and closed on 20 December 2016. More than 1000 people responded. A wide range of people took part, including people who use services, carers, providers and professionals. The analysis and full Consultation Report was undertaken by The Campaign Company; available as part of the associated papers.

The key messages from the consultation were: concerns about funding changes to familiar and trusted services; and the impact of the reduction of centres and staff on the quality of services experienced by people who use services. There was some support for the building-based Community Support Service.

There was concern about the changes to transport and the importance of accessibility of services was emphasised. There was also an emphasis on the need for transition time and resources for currently funded services.

Key needs that were highlighted in addition to those already outlined included: carers' opportunities for work, the importance of routine and security, as well as independence and stimulating activities for people using services; and access to expert support. Specific references were also frequently made to the needs of people with autism.

Concern was expressed that people who are not classified as 'vulnerable', but who rely on daytime support centres, will be disproportionately affected. Many people also raised that there will be a specific negative impact on carers, due to less respite as a consequence of fewer centre-based activities.

The final proposals reflect this feedback, and are intended to mitigate for these potential impacts.

Further information about people's needs for daytime support, and current use of daytime support, is available in the Report of the Review of Daytime Support, in the associated papers.

Alternatives considered / rejected:

This review followed the joint budget that was set by the County Council in February 2016 and committed a review of Oxfordshire County Council Health and Wellbeing Centres and community and voluntary sector provided and Oxfordshire County Council part funded daytime support for older people (tier 2) to save £1 million. It has taken place in the context of the council having £15.2 million of unidentified savings to make between 2017/18 and 2019/20.

The savings proposals previously considered and rejected were: ceasing to provide Health and Wellbeing Centres mostly for older people; ceasing £992,000 of grant funding to tier 2 community and voluntary daytime support services mostly for older people; and ceasing to provide associated transport.

The review looked at daytime support for all adults in Oxfordshire, as daytime support is an important part of the lives of many older people, people with dementia, people with learning disabilities and people with physical disabilities. It provides vital links to the community that help people to live independent and fulfilling lives. We want to ensure it meets a wide range of needs and is fit for the future and sustainable over the longer term, in a challenging financial context. Leaving current arrangements unchanged was not an option, as the current model does not meet the

full range of needs for daytime support, people's changing aspirations, and the challenging financial context.

The proposed model offers support to enable people to live well in their communities, offers additional tailored support to vulnerable people to increase their wellbeing and live as independently as possible, and provides a core service to people who have assessed eligible needs for support.

The options proposed for meeting people's assessed eligible needs for support acknowledges that as more and more people in Oxfordshire with assessed eligible needs have been able to choose how to use their own personal care budgets, there is a great deal more choice of services on offer. We considered the option of moving all the provision of daytime support into the community and voluntary and private sectors. This would have been funded via personal budgets. However, this was not taken forward, on the basis that a council provided service could act as a provider of last resort, mitigate the risks of market failure and of specific provider failure, and increase the choice available to individuals.

In developing the options for the Community Support Service proposed, we took into account the priorities and ideas shared by the working group of people who use daytime support services and carers. Priorities included ensuring a flexible range of support and facilities to meet people's needs, and opportunities for people to take part in stimulating activities – further information is available in the appendices to the Report of the Review of Daytime Support. Modelling work was also carried out to explore different options. Further information on the options explored is provided in Appendix 6 - Methodology for determining council provided Community Support Service.

We consulted on two options for delivering the Community Support Service: a building-based model or a mixed-model. The option of a mixed-model for delivering the Community Support Service has not been taken forward, as a preference was shown for the building-based service option.

Impact Assessment:

Impact on Individuals and Communities:

The reduction in funding for daytime support, if it results in a reduction in the availability of service, may have an adverse impact on people using these services and their carers if there is no suitable mitigation in place. The main risks and mitigations are detailed below.

Further information is also available in the associated papers.

People using currently funded tier 2 services – community and voluntary daytime support services

We will replace our current annual funding for 47 community daytime support services of £992,000 a year, with grant pots which services could bid for under the following two categories:

Sustainability fund - We will provide grants to enable the ongoing delivery of daytime support services in areas of high need.

Innovation fund - We will provide one-off grant funding to establish self-sustaining projects to fill gaps in services.

We will offer support to voluntary and community organisations to become self-sustaining, and communities to develop local solutions, through the community and voluntary sector support we fund.

We will work with affected services to find alternatives to current transport arrangements, including offering our bookable transport service (The Comet) and supporting the development of Good Neighbour Schemes.

These mitigations are designed to reduce the likelihood of a reduction in service availability, and thus potential adverse effects.

People using currently provided tier 3 services – Health and Wellbeing Centres & Learning Disability Daytime Support Services

The Community Support Service will replace our Health and Wellbeing Centres and Learning Disability Daytime Support Services. People could choose to purchase support from this council-provided, countywide, flexible service, using Personal Budgets or self-funding.

We understand that people are concerned about how the new Community Support Service will work in practice, and the potential impact of a reduced number of centres on the impact and quality of care that people receive. We address these concerns in the Response to the Consultation paper. In summary, we will ensure good-quality, person-centred support is provided by skilled and experienced staff; we will ensure that buildings are large enough to accommodate different requirements; we will ensure that people are fully supported through the changes; and we will ensure that everyone who is eligible for transport support receives this, irrespective of where in the county they live.

Transition

In the event that these changes are agreed to daytime support, transition support will be in place to ensure that people using current services are supported through the changes. Everyone will be offered the opportunity of an assessment, to determine whether they have eligible needs for support. Everyone who has assessed eligible needs for support will be supported to explore their options and decide how they

want their needs to be met in the future, in accordance with their needs, aspirations and resources. This will include a dedicated team of Oxfordshire County Council staff to support this, working with people using services and with their families and staff who know them well. There will be several months for our skilled and experienced staff in our current daytime support services to support people through changes.

The Community Information Network would prioritise working with people who have been attending Health & Wellbeing Centres and other directly affected services and have been assessed as not having eligible social care needs, or have decided not to have a social care needs assessment. They will assist these people to find alternative day time support in their communities, providing a 'bespoke package' of information and advice relevant to each individual. This could include choosing to buy a council service, befriending, transport, practical support from a good neighbour scheme, attending a local lunch club, or joining a local social group. This will ensure that people who currently benefit from daytime support opportunities but who are assessed as not meeting the eligibility criteria for support from the council, are still provided with personalised support to explore their options.

Through the transition support for community and voluntary sector daytime support services, we intend to encourage as many of these services as possible to decide to continue. As well as providing continuity for the people who benefit from them, this will help to ensure that various daytime support opportunities exist in communities across the county, including for people who are currently using council-provided services who may not choose to use the new Community Support Service.

Summary of risks and mitigations for people with daytime support needs

Risk	Mitigation
<p>There is a risk that, if the proposed new model for daytime support is not effective in enabling services to continue and in helping alternatives to develop and supporting people to use them, people’s existing needs may escalate as a result of not receiving daytime support.</p>	<p>The proposed model includes support to enable community and voluntary support to continue and develop, as well as to support new self-sustaining initiatives to develop.</p> <p>The proposed options include support and funding to increase the range of support options available. This could have a positive impact, as support options are developed to reflect new or unmet demand.</p> <p>The council would also ensure people are aware of alternative ways to meet their care and support needs, through the information and advice proposals. The council will also ensure people who have eligible needs for care and support, are supported to meet them.</p> <p>The new council service will provide flexible, countywide support to meet a wide range of</p>

	<p>needs. This could increase the suitability of support, to meet a wider range of needs.</p>
<p>There is an increased risk of social isolation amongst people using daytime support services if the daytime support service remains open, but funding for transport to the centre is removed as this would limit access for those who rely on council-funded transport (e.g. adjusted minibuses for wheelchair users)</p> <p>There could be an increased risk of this in more isolated, rural communities without public transport links.</p>	<p>Transport support will be provided to everyone who is eligible for transport support, in accordance with their assessed needs. Information and advice will be provided to people using services about alternative sources of transport available across the county.</p> <p>Voluntary and community sector providers may be able to source transport to their services for people in need of this. The council will work with affected services to find alternatives. There will be a particular focus on supporting services which currently rely on council provided transport, to identify alternatives. The council will offer The Comet, our bookable transport service. The council will also facilitate the development of good neighbourhood schemes, which offer transport alongside befriending and practical support.</p> <p>Support will be targeted at most affected communities, and solutions tailored to their needs and local available resources.</p>
<p>There is an increased risk that people with lower incomes will be adversely affected, if community and voluntary provided services become more dependent on raising income from increasing charges. This could also apply to people using council services who are assessed as not having eligible needs, who could choose to self-fund this support or use alternatives.</p>	<p>The Sustainability Fund – yearly grants – will be targeted at enabling the ongoing delivery of daytime support opportunities which are in areas of high need in the county. We will determine this broadly, however we will take into account the index of multiple deprivation, as well as the information we hold on the sustainability of services, the needs and resources of the local community, and on how the service meets our aims for daytime support. This will mitigate the impact of the reduction in grant funding on services which would be most affected and least able to transition to more self-sustaining models of delivery, and therefore, people who use these services.</p> <p>Throughout the transition we will ensure the provision of information and advice, including on benefit checks and support available.</p>
<p>There is a risk that if daytime support services' support is reduced, carers may struggle to find suitable, sustainable</p>	<p>Assessments will be offered to all carers supporting people who use these services, and their needs for support met if they are eligible.</p>

<p>alternatives which make it possible for them to continue in their caring role. This will especially impact on carers who provide high levels of support, working carers, and carers with other responsibilities, for example caring for children. There is a risk that this could lead to the breakdown of caring relationships, with negative consequences for carers and the person they care for.</p>	<p>Work has taken place with carers to understand their needs within the context of daytime support and proposals have taken these needs into account.</p> <p>We will ensure that people with daytime support needs who need full days of support, and carers who need full days of respite, are able to access this. The Community Support Service will work flexibly, providing support to meet the needs of working carers and carers with other responsibilities.</p> <p>The transition support for community and voluntary sector services is intended to encourage as many of these services as possible to decide to continue. As well as providing continuity for the people who benefit from them, this will help to ensure that various daytime support opportunities exist in communities across the county, including for people who are currently using council-provided services who may not choose to use the new Community Support Service. This will also help to mitigate the potential adverse impact on carers, who benefit or would benefit from this local support.</p>
<p>There is a risk that people using council daytime support services are likely to have to travel further, as the number of locations is reduced.</p>	<p>The Community Support Service will provide countywide support, including on an outreach basis in local communities as well as in building bases. The building base locations chosen were partially modelled on reducing travel distances for people using daytime support services. The average journey would be 4.6km.</p> <p>Integrating the transport into the support service will mean shorter journeys for many people than now, and journeys will be planned flexibly according to individuals' needs.</p>
<p>People with particular conditions and needs could be particularly impacted, if the proposed model is not suitable to meet their needs.</p>	<p>The proposed model for daytime support provides a range of flexible options, to meet different needs.</p> <p>The Community Support Service will provide person-centred, flexible support from skilled and experienced staff. People with eligible needs with Personal Budgets can also choose</p>

	<p>to use these on a range of alternatives, including specialist support.</p> <p>To address autism and dementia skill gaps, we will invest in increasing the capacity of the tailored services – the Wellbeing and Employment Support Service and the Dementia Support Service – to support people with autism, and to enable them to train other daytime support services in dementia support.</p>
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Impact on individuals and communities – protected characteristics

The proposals could particularly impact older people and people with disabilities, who use daytime support. They could also particularly apply to women, as the majority of older people, and carers, are women. They could also particularly apply to people from ethnic minority groups, as more people with ethnic minorities are likely to have a disability. These potential impacts are not likely to be significantly different to those set out above, and therefore the mitigations set out above apply. We anticipate that people with the protected characteristics of gender reassignment, pregnancy and maternity, religion or belief (including lack of belief), sexual orientation, and marriage and civil partnership, are not at risk of being adversely affected by the proposals. There could potentially be a positive impact, as the proposals include support to new initiatives to develop – through the Innovation Fund – which could support targeted initiatives developed to meet particular needs.

Impact on Staff:

Risk	Mitigation
In the short-term, there is a risk that there will be an increased demand for services provided by the adult social care teams.	Effective transition planning will mitigate this risk. It will include the provision of additional staffing resource.
When we look at staffing needs and the structure for the proposed new Community Support Service, they are different from those in the current service. As a consequence of the proposals there are likely to be redundancies across day services and we are anticipating the need to develop new job descriptions.	<p>Following decisions on the overall future shape of daytime support, and as part of the decision-making process in developing the Community Support Service, the full impact on staff will be assessed and an appropriate staff consultation will take place.</p> <p>We want to keep as many people employed in permanent roles as possible and have suspended recruitment to permanent roles to support this process. Support is also available to staff throughout, which staff have been and will continue to be briefed on.</p>

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Impact on other Council services:

<p>In the short-term, there is a risk that there will be an increased demand for services provided by the adult social care teams.</p>	<p>Effective transition planning will mitigate this risk. It will include the provision of additional staffing resource.</p>
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Impact on providers:

Risk	Mitigation
<p>The proposals for community and voluntary daytime support services are likely to have adverse impacts on providers of these services who are currently funded by Oxfordshire County Council. This also applies to their staff and volunteers.</p> <p>The extent of this impact will depend on the sustainability of each provider, and how dependent it is on county council funding. It will also depend on whether they opt to seek alternative operating models and/or sources of funding, and how successful they are in achieving this.</p> <p>This is particularly likely to impact on providers in areas of deprivation, with fewer resources particularly financial means of local people to pay for services and potentially, volunteering capacity. This will reduce the likelihood of providers in these areas to develop more self-sustaining models, including generating other sources of income.</p>	<p>Engagement with voluntary and community sector providers will begin early, so that providers can consider:</p> <ul style="list-style-type: none"> • reviewing their business models • planning service changes with local communities • sharing expertise and learning from each other • opportunities for joint working • alternative sources of funding and income generation <p>This will be supported by council-funded voluntary and community infrastructure support, which will work with affected providers to develop self-sustaining models.</p> <p>This will also be supported by the availability of grant funding, which providers can apply for. This will support services which are unable to develop self-sustaining models in areas of high need, as well as enable new self-sustaining initiatives to develop.</p> <p>The Sustainability Fund – yearly grants – will be targeted at enabling the ongoing delivery of daytime support opportunities which are in areas of high need in the county. We will determine this broadly, however we will take into account the index of multiple deprivation, as well as</p>

	<p>the information we hold on the sustainability of services, the needs and resources of the local community, and on how the service meets our aims for daytime support. This will mitigate the impact of the reduction in grant funding on services which would be most affected and least able to transition to more self-sustaining models of delivery.</p> <p>We are recommending significant additional investment in transition support, to provide additional resources, time and support to enable a phased transition. This will mitigate the impact of these proposals on these service providers, in providing more funding and time for them to continue and adapt, and build longer-term resilience to ensure the sustainability of their services.</p>
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Social Value
If the Public Services (Social Value) Act 2012 applies to this proposal, please summarise here how you have considered how the contract might improve the economic, social, and environmental well-being of the relevant area.

How might the proposal improve the economic well-being of the relevant area?
N/A

How might the proposal improve the environmental well-being of the relevant area?
N/A

Action plan:

Action	By When	Person responsible
<i>Review Service and Community Impact Assessment - incorporating feedback via the public consultation – to feed into the decision-making process.</i>	<i>Post consultation and pre-decision making process – by January 2017</i>	<i>Benedict Leigh</i>
The implementation and development of any new model would be monitored and reviewed, to ensure that impact can be assessed and further	The initial post implementation review is planned to start on 1 st April 2018.	Benedict Leigh

mitigations developed if required. The council will work closely with its partners in this.		
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Monitoring and review:

Person responsible for assessment: Lead Commissioner

Version	Date	Notes (e.g. Initial draft, amended following consultation)
V1	October 2016	Pre-consultation draft
V2	January 2017	Post-consultation draft

Division(s): N/A

CABINET – 21 JANUARY 2020

LOCAL AREA SEND RE-VISIT REPORT – INSPECTION DATE 15 – 17 OCTOBER 2019.

Report by Head of SEND

RECOMMENDATION

Cabinet is RECOMMENDED to note the outcome of the SEND Local Area Re-Visit report, published on the 23 December 2019.

Executive Summary

1. The Local Area SEND revisit was undertaken on the 15 – 17 October 2019, with the final report published on the 23 December 2019. The report details the outcome of the report which highlighted that three out of five areas of significant weakness highlighted in the Local Area SEND Inspection in September 2017 had been deemed to have made sufficient progress.
2. The following areas were highlighted as having made sufficient progress:
 - The lack of clearly understood and effective lines of accountability for the implementation of the reforms;
 - The timeliness of the completion of EHC plans;
 - The high level of fixed-term exclusion of pupils in mainstream secondary schools who have special educational needs and social emotional and mental health needs in particular.
3. The two areas deemed not to have made significant progress are:
 - The quality of EHC plans.
 - The quality and rigour of self-evaluation and monitoring and the limited effect it has had on driving and securing improvement.
4. The Local Area will be required to provide an updated Action Plan to the Department for Education (DfE) but will not be subject to a further Ofsted/CQC inspection in this inspection window.
5. This action plan will be monitored each month by the SEND Performance Board.
6. The Department for Education will provide monitoring visits, however the frequency of these are yet to be decided, however it is likely that it will be one further visit in 2020.

Financial and Staff Implications

7. There are no Financial or Staff implications in this report

Equalities Implications

8. There are no Equalities Implications in this report

Sustainability Implications (Environmental Impacts – Reducing our Climate Impact)

9. There are no direct sustainability implications in the policy, or the operation/administration of the policy.

JAYNE HOWARTH

Head of SEND

Background papers: Local Area SEND RE-Visit report

Contact Officer: Jayne Howarth, Head of SEND tel:07776 996944

January 2020

20 November 2019

Ms Lucy Butler
Director of Children's Services
Oxfordshire County Council
New Road
Oxford
OX1 1ND

Ms Lou Patten, Chief Executive, Oxfordshire Clinical Commissioning Group
Ms Jayne Howarth, Local Area Nominated Officer

Dear Ms Butler and Ms Patten

Joint area SEND revisit in Oxfordshire

Between 14 October and 17 October 2019, Ofsted and the Care Quality Commission (CQC) revisited the area of Oxfordshire to decide whether sufficient progress has been made in addressing each of the significant weaknesses detailed in the written statement of action (WSOA) issued on 27 November 2017.

As a result of the findings of the initial inspection and in accordance with the Children Act 2004 (Joint Area Reviews) Regulations 2015, Her Majesty's Chief Inspector (HMCI) determined that a written statement of action was required because of significant areas of weakness in the area's practice. HMCI determined that the local authority and the area's clinical commissioning group(s) (CCGs) were jointly responsible for submitting the written statement to Ofsted. This was declared fit for purpose on 28 March 2018.

The area has made sufficient progress in addressing three of the five significant weaknesses identified at the initial inspection. The area has not made sufficient progress in addressing two significant weaknesses. This letter outlines our findings from the revisit.

The inspection was led by one of Her Majesty's Inspectors from Ofsted and a Children's Services Inspector from CQC.

Inspectors spoke with parents and carers, and local authority and National Health Service (NHS) officers. Inspectors considered 492 responses from parents and carers who responded to the revisit online survey. Meetings were held with some headteachers, special educational needs coordinators (SENCOs) and leaders from mainstream primary and secondary schools and specialist provision to discuss how they are implementing the disability and special educational needs reforms. Inspectors looked at a range of information about the performance of the area,

including the area's self-evaluation. A sample of education, health and care (EHC) plans were scrutinised, along with their relevant assessments. Inspectors met with leaders from the area for health, social care and education. They reviewed performance data and evidence.

Main findings

■ **The lack of clearly understood and effective lines of accountability for the implementation of the reforms.**

Arrangements for holding leaders to account across education, health and care have improved since 2017. A clear accountability and governance structure for special educational needs and/or disabilities (SEND) has been established. The SEND Performance Board is accountable to the Health and Well-being Board. Lines of responsibility are usefully explained and represented in a visual diagram on the local offer. Senior leadership from education, health and care is well represented at the SEND Performance Board. As a result, SEND is now a shared priority across all partners in the local area.

The designated clinical officer (DCO) is in post and working effectively. The positive impact of this work can be seen in improved health involvement in EHC needs assessments.

The SEND Performance Board routinely monitors the actions being taken to bring about improvement. Consequently, accountability has been strengthened and there is now a helpful mechanism for overseeing improvement work in SEND and holding leaders to account. However, despite these positive developments, many parents remain unclear about who is accountable for different aspects of SEND provision. Leaders acknowledge that there is more work to do to ensure that communication with parents improves.

The local area has made sufficient progress in addressing this significant weakness.

■ **The quality and rigour of self-evaluation and monitoring and the limited effect it has had on driving and securing improvement.**

Leaders have an aspirational vision for the work they are doing to improve outcomes for children and young people with SEND in Oxfordshire. However, parents do not yet feel part of this vision and do not fully understand what work is being done to achieve it.

Co-production with parents, carers, children and young people is still at a relatively early stage of development in the local area. The promising start seen at the previous inspection has stalled. There are some pockets of positive practice and the recently published 'Co-production Handbook'

provides helpful materials to support this work. However, co-production as a way of working is not yet consistently established in the local area's systems and structures. Parents are not involved in strategic developments right from the start. For example, important developments, such as the 'Behaviour Pathway', have only included consultation with parents rather than true co-production. Consequently, many parents are frustrated by the pace of change and do not always feel confident in the work of the local area to improve outcomes for children and young people with SEND.

A consultation for the draft SEND strategy is under way. This sets out a helpful blueprint for future work and improvements, although these are largely education focused. However, while there are several positive and innovative projects in place to improve SEND provision, leaders do not check well enough, especially with families, that these are having the desired impact. Furthermore, there is not yet an overarching co-produced strategy that is effectively bringing these projects together and ensuring swift improvement in the local area.

Leaders' self-evaluation of progress in this area of work is overly positive and does not fully reflect the experiences of children and young people with SEND and their families.

The local area has not made sufficient progress in addressing this significant weakness.

■ **The quality of EHC plans.**

The high volume of EHC plans being produced and frequent changes of staffing in the SEN assessment team have contributed to a slow rate of improvement in this aspect of the written statement of action. Helpful work is under way to improve the quality of EHC plans. However, it is too soon to see the impact of this work.

A useful quality assurance framework has been established. A multi-agency panel now meets regularly to audit the quality of a sample of EHC plans against the framework. Pertinent recommendations for improvements are made, although the panel is not yet checking on the progress of the implementation of these recommendations.

Overall, the quality of EHC plans remains too variable. Outcomes described in the EHC plan do not reliably reflect children, young people and their parents' aspirations. Person-centred approaches are used in the EHC needs assessment, but this information is not used effectively in the plan. Typically, EHC plans are focused predominantly on a child or young person's educational needs and do not successfully capture a complete view of their education, health and care needs. For young people, transition planning is often weak and does not provide a useful pathway to support young people to make a successful transition to adulthood.

Health contributions to the EHC needs assessment process are too inconsistent. Although professional reports from therapists and Child and Adolescent Mental Health Services (CAMHS) are detailed and useful, contributions from universal services, such as school nursing and health visiting, are often not of the same quality. General online training about EHC plans is now provided to health professionals, but focuses too heavily on the assessment process rather than improving the quality of contributions. As a result, health advice is not always enhancing the quality of EHC plans.

EHC plans are not reliably updated following an annual review within the prescribed timeframes. There are often lengthy delays in making amendments to EHC plans following an annual review. This results in too many EHC plans that no longer accurately describe children and young people's needs and the required provision. The current quality assurance system focuses on new EHC plans, but does not include existing EHC plans. Leaders have firm plans in place to improve this aspect of work, including increasing capacity in the SEN team, although this work is not yet complete.

Parents experience high levels of frustration with the EHC processes. They told us that they do not find it easy to know how decisions are made or who is responsible for different aspects of the process. Parents described continually having to 'chase' professionals to find out information about their child's EHC plan.

The local area has not made sufficient progress in addressing this significant weakness.

■ **The timeliness of the completion of EHC plans.**

More new EHC needs assessments are being completed within the statutory timeframe than in the past. Despite a significant increase in the number of requests for EHC needs assessments, the percentage of new EHC plans finalised within the required 20 weeks is now broadly in line with the national average. Sensibly, all aspects of the EHC needs assessment process have been rigorously scrutinised. Helpful adjustments to assessment procedures are being made which are improving efficiency.

The DCO is working proficiently to coordinate health contributions to EHC needs assessments. Pleasingly, 80% of health advice and 100% of advice from therapists are successfully submitted within the statutory timeframe. Last year, all age phase transfers were completed within the appropriate timeframe. Leaders have well-considered plans in place to continue to improve the timeliness of EHC needs assessments.

The local area has made sufficient progress in addressing this significant weakness.

■ **The high level of fixed-term exclusion of pupils in mainstream secondary schools who have special educational needs and social, emotional and mental health needs in particular.**

Helpful initiatives to reduce the high level of fixed-term exclusions in mainstream secondary schools are starting to make a difference. Encouragingly, the number of days lost to exclusion are reducing. The rate of fixed-term exclusions for pupils with social, emotional and mental health needs in secondary schools is also lower than it was in 2017. Leaders are not complacent. They know that, despite these promising signs, some children and young people are still experiencing too many fixed-term exclusions while others experience prolonged reduced timetables. Leaders are firmly committed to building on their success in reducing fixed-term exclusions to continue to tackle these issues.

Since the inspection in 2017, the Learner Engagement Strategy has been established. This is the area's approach to reducing rates of exclusion. Parents are involved in this now and leaders rightly acknowledge that parents should have been part of this development from the beginning. Sensibly, the learner engagement board has been merged with the early help board, to ensure that support can be offered to families holistically.

Firm leadership from Oxfordshire local authority is providing effective support and challenge to schools to reduce fixed-term exclusions. Leaders have ensured that they now have a much more accurate picture of the pattern of exclusions across Oxfordshire because they have rigorously checked the information they are given by schools. In some cases, this has included personal visits to schools to scrutinise individual children's records. Leaders challenge schools when they notice that exclusion rates are particularly high and there is convincing evidence of significant improvements as result of this robust approach.

Processes are being effectively strengthened so that schools can challenge and hold each other to account for the use of exclusions. Effective meetings of the In-Year Fair Access Panel ensures school leaders work well with a range of professionals in the local area to provide earlier support for children and young people who are at risk of exclusion.

There are several initiatives focused on reducing fixed-term exclusions and improving support for children and young people with social, emotional and mental health needs. These sensibly include professionals across education, health and care. The Community Around the School Offer (CASO) is a positive example of a coordinated multi-agency approach to support vulnerable children and young people who are at risk of exclusion because of wider issues that affect their well-being. For example, one project is focused on supporting children and young people who have been identified as being at risk of criminal exploitation. There are promising signs that this work is having a positive impact on reducing exclusions.

The local area has made sufficient progress in addressing this significant weakness.

The area has made sufficient progress in addressing three of the five significant weaknesses identified at the initial inspection. As not all the significant weaknesses have improved, it is for the Department for Education (DfE) and NHS England to determine the next steps. Ofsted and CQC will not carry out any further revisit unless directed to do so by the Secretary of State.

Yours sincerely

Claire Prince
Her Majesty's Inspector

Ofsted	Care Quality Commission
Christopher Russell South East Regional Director	Ursula Gallagher Deputy Chief Inspector, Primary Medical Services, Children Health and Justice
Claire Prince HMI Lead Inspector	Lee Carey CQC Inspector

cc: Department for Education
Clinical commissioning group(s)
Director Public Health for the area
Department of Health
NHS England

Division(s): All Oxford

CABINET – 21 JANUARY 2020

CONNECTING OXFORD

Report by Director for Planning and Place

RECOMMENDATION

The Cabinet is **RECOMMENDED** to endorse the overall approach proposed as the basis for further scheme and business case development of Connecting Oxford proposals in partnership with Oxford City Council.

Executive Summary

1. Connecting Oxford proposals - further traffic restrictions across Oxford and a workplace parking levy (WPL) in Oxford's Eastern Arc - could deliver significant benefits for Oxfordshire including reduced congestion and improved public transport connectivity, better air quality and reduced carbon emissions, and more people participating in active and healthy travel.
2. A timetable confirms the development of a detailed scheme and a DfT compliant business case would be undertaken between January/February 2020 and Autumn 2021, with the scheme designed and assessed to ensure any adverse impacts are mitigated. The necessary funding for the next stage of work (estimated to be £1.602m) has already been secured from the Housing & Growth Deal.
3. Initial proposals were recently subject to an extensive engagement exercise with the feedback confirming there is recognition that doing nothing is not an option. Overall, only a minority of online survey respondents – both among the public (25%) and stakeholders (32%) – believed the proposed WPL would make journeys worse. Feedback on the proposed traffic restrictions was more balanced, with a minority of the public (42%) responding that these would make their journey worse, while a small majority of stakeholders (53%) believed their journeys would be worse.
4. Further consultation and engagement would be undertaken as part of the next phase of work. This includes the creation of the 'Connecting Oxford Partnership' to help shape proposals and involving employers and businesses affected by the WPL, including those representing health and education sectors and the private sector. Further engagement would also be carried out with those affected by traffic restrictions, including residents and community groups, smaller employers and businesses.

Introduction

5. This paper outlines Connecting Oxford proposals – further traffic restrictions across Oxford and a workplace parking levy in Oxford’s Eastern Arc – and the potential transport, environmental and other benefits it would bring to Oxfordshire. It confirms the findings of a recent engagement exercise including views on proposals from members of the public and stakeholders. The paper also includes a timetable and costs for work required to develop a detailed scheme proposal and business case.

Background

6. The Oxfordshire Local Transport Plan (LTP), [Connecting Oxfordshire](#), which includes the [Oxford Transport Strategy](#) (OTS), sets out a vision and strategy to transform how people travel to and within Oxford to overcome existing problems of congestion and pollution and ensure future growth can be accommodated.
7. The OTS confirms that doing nothing is not an option with a 25% increase in commuting journeys to and within Oxford predicted by 2031 which, if current travel behaviours persist, could result in 13,000 more commuter car trips each day. This amount of additional car traffic in Oxford is simply not sustainable and would severely overburden the transport network and impact on people’s quality of lives.
8. To overcome these challenges the OTS sets out an integrated strategy based on the following components:
 - A better **public transport network**, primarily bus-based, with more capacity (including new, more remote Park & Rides) and faster journey times.
 - A **walking and cycling network** that is continuous and high-quality with space for very high levels of cycling and more pedestrians in areas of high footfall.
 - A **reduction in traffic levels** to enable the above bus and walking and cycling improvements, partly through substantial road space reallocation, as well as reducing traffic emissions.
9. The councils have been very successful in securing funding for these plans, with over £80 million available over the next five years for schemes in and around Oxford including Banbury Road, Botley Road, Woodstock Road, A40 and A44. Additional funding for other schemes will be required including further transport ‘corridor’ improvements inside and outside Oxford, rail improvements at Oxford station and, in the longer term, the Cowley branch line.
10. Associated with implementation of Connecting Oxford, there will also be a further roll-out of Controlled Parking Zones (CPZ) across areas not covered and in addition to the nine CPZ schemes that the county council [approved in April 2019 for formal consultation](#).

11. The councils also continue to work towards the implementation of a Zero Emissions Zone (ZEZ) for the city, which would see all road traffic become zero emission by the mid-2030s. And in combination with other proposals set out in the OTS, including those contained within Connecting Oxford itself, will help to improve air quality and therefore people's health and wellbeing.
12. The provision of dedicated infrastructure for pedestrians, cyclists and public transport – bus lanes, cycle lanes, footpaths and public realm – have helped manage the growth in travel movements over past years. However, all parts of the transport network are now under pressure. If we are to transform how people travel to and within Oxford and provide enough capacity to meet future travel demand, investment is needed to improve pedestrian, cycle and public transport routes to make sure these are more attractive to users. We must also focus on measures that provide sustained traffic reduction and support increased modal shift away from private car travel.
13. In recognition of this, the OTS proposes a workplace parking levy, traffic restrictions and parking controls. Whilst these measures would be applied within Oxford, the improvements they would enable and directly deliver would have benefits across the county, particularly for the large number of people who currently regularly travel in and out of Oxford for work, education or leisure and those who will do so in the future as the county grows.
14. Traffic reduction would also reduce carbon dioxide emissions, with transport in the UK estimated to contribute about 33 per cent to overall emissions – and 17% within the city of Oxford - and therefore supports Oxfordshire councils in their own commitments to zero carbon.

Connecting Oxford Proposals

15. Proposals contained in [Connecting Oxford](#) are based on the policies and strategy in the county's LTP which includes the OTS. An illustration of the proposals is provided at **Annex 1**, with a summary below including potential benefits.

Traffic restrictions

What are they?

16. Traffic restrictions are places where the road would be closed to most traffic in both directions. They would be similar to the existing "bus gate" traffic restrictions in the High Street and other locations in Oxford city centre, which were introduced in 1999.
17. Buses, cyclists, taxis and private hire vehicles, and all emergency vehicles, would be allowed to pass through the traffic restrictions. There may also be exemptions for other vehicles including those with Blue Badges.

18. Like existing restrictions in the city centre, the new restrictions would be enforced using cameras. There would be no rising bollards or barriers.
19. Like current restrictions, the new restrictions may not all operate over the same time period. Some may only operate during peak times.

What are the benefits?

20. Traffic restrictions reduce the number of vehicles taking up valuable space on the roads. This means road space can be reallocated to create better, cleaner space for other modes of transport:
 - Wider, segregated cycle lanes to allow for all abilities of cyclist;
 - Safer, more pleasant walking and cycling environment;
 - Buses will be able to flow freely, even in places where there is no road space for bus lanes;
 - Less pollution and noise; and
 - Essential vehicles will move around the city more easily.
21. On major routes within the city (e.g. A- and B- roads) it is estimated that traffic levels need to be reduced by about 25% to create free-flowing traffic movement. In the two years after the 1999 city centre traffic restrictions were introduced, traffic reduced by around 60% in Oxford High Street, around 40% on Magdalen Bridge, and around 20% in the city centre overall. Over the longer term, city centre traffic flows have continued to reduce slightly, with overall flows into the city centre 25% lower today than in the 1990s.
22. Reduced traffic levels would have major air quality and carbon reduction benefits, and more people travelling by active modes would benefit from improved physical and mental health and wellbeing.

Where would they be?

23. In Oxford city centre three new traffic restrictions are proposed at Worcester Street, Oxpens Road / Thames Street and South Parks Road / St Cross Road to reduce the number of motor vehicle trips which pass through the city centre. In the Eastern Arc of Oxford two new traffic restrictions on Marston Ferry Road and Hollow Way are proposed to reduce traffic on the B4495.
24. Other traffic restriction and other traffic management schemes, including 'low traffic neighbourhoods', might be required to ensure traffic is not displaced and residential roads are not used as rat-runs.

Workplace parking levy

What is it?

25. A Workplace Parking Levy (WPL) is an annual charge paid by employers for each parking space they provide, on or off-site, that is used for employee

(commuter) car parking. Operational parking is exempt from a WPL as are fleet, visitor and customer car parking spaces. Whilst employers are responsible for paying the charge, they may choose to pass some or all of it on to employees who park at work.

26. In Nottingham, where a WPL was implemented in 2012, the annual charge per space is currently £415. In Oxford, the annual charge would likely be £400 - £600. This is a current working assumption based on the need to fund new bus services, and cycle and pedestrian infrastructure which is estimated to cost between £60-£100 million. The levy in Nottingham has been used as a guide, as well as consideration of the cost of an annual SmartZone bus pass (£565) in Oxford. The actual figure will need to be established as part of the development of a business case and directly relate to the investment needed to improve alternatives to car journeys.
27. The powers to introduce a WPL are contained in the Transport Act 2000. Although a WPL scheme is developed, consulted on and implemented by the local transport authority, it must be approved by the Secretary of State for Transport. It must also be promoted, and income collected, by the Local Transport Authority (in Oxfordshire, the county council).
28. By law, net proceeds from a WPL are only available for the purpose of directly or indirectly facilitating achievement of local transport policies including those set out in the Oxfordshire Local Transport Plan and Oxford Local Plan.

What are the benefits?

29. A WPL incentivises employers to reduce their car parking supply and/or incentivises employees not to drive to their place of work, and travel by public transport, walk or cycle instead, which would help to reduce traffic and congestion, especially at peak times. There would also be other health and mental wellbeing benefits from greater uptake in active travel modes and traffic reduction would also reduce carbon emissions.
30. It would also provide a substantial, predictable, locally controlled source of funding which can be used for both capital and revenue projects, so new and improved bus services as well as funding for additional Park & Ride capacity and better walking and cycling routes. Employer and employee benefits, including grants for car parking management and discounted bus fares and Park & Ride parking could also be offered.
31. The funding from the levy would also be used to provide travel planning and car parking management advice and assistance to support sustainable travel but also assist businesses and employers to implement and comply with the scheme, and to negate any adverse impacts of the scheme.
32. Nottingham City Council estimate that for every £1 raised by WPL, £3 of external funding has been levered in. This combined investment has in total delivered £10 of economic benefit to the city per £1 raised by WPL.

Where would it be?

33. The initial proposal for the WPL area, which was the subject of the recent engagement exercise, covered a strip around the Eastern Arc of Oxford, as shown in **Annex 1**. The area is an irregular shape because it follows the path of a proposed 'core' route for new high frequency bus services, linking major employers in the area to Park & Ride sites and the larger towns in Oxfordshire. The area covers everywhere within the Ring Road that is within around 10 minutes' walking distance from the core bus route as shown in **Annex 2**.
34. This Eastern Arc area was chosen because it:
- Contains just under half of the city's commuter car parking spaces, and so generates a significant amount of the traffic and congestion in and around Oxford; and
 - Because it is not as well served by bus, pedestrian and cycle routes as it needs to be – and so needs significant investment in transport infrastructure and services.
35. Alternative options including expansion of the WPL will be considered at the next stage, as required as part of the DfT business case process (see paragraph 45).

Public and Stakeholder Engagement - Sep-Oct 2019

36. An extensive engagement exercise to obtain feedback from the public and stakeholders on the Connecting Oxford proposals was held between 18th September and 20th October 2019. Over 3,000 responses were received in total; 2932 responded via an online survey (95% of which responded in a personal capacity with the remainder (5%) responding on behalf of a business, employer or other organisation). In addition, some further written feedback was received in emails and letters. Respondents included employers comprising businesses and other organisations, as well as parish councils and a variety of different community interest groups. **A detailed breakdown of the consultation responses is in Annex 3.**
37. In summary, the feedback confirms there is recognition that doing nothing is not an option. Overall, only a minority of online survey respondents – both among the public (25%) and stakeholders (32%) – believed the proposed WPL would make journeys worse. Feedback on the proposed traffic restrictions was more balanced, with a minority of the public (42%) responding that these would make their journey worse, while a small majority of stakeholders (53%) believed their journeys would be worse.
38. Across the public responses as a whole, generally there was strong support for both sets of measures among those that used a car for only part of their journey to their regular destination, or travelled entirely by other means – public

transport, cycling or walking; and strong opposition among those that travelled solely by car.

39. Nevertheless, half of online survey respondents (50%), including car drivers, wanted to see improvements for cycling and buses to and within Oxford.
40. Several individuals and stakeholders, including the University of Oxford, indicated that proposals should go further – including extending the current proposed WPL zone to other parts of the city - or requested further justification for not extending the current proposed WPL zone to other parts of the city.
41. However, there were also real concerns among others around the potential impact of proposals including reduced access to facilities, services and work, displacement of traffic and pollution, increased cost and time spent travelling. A significant number of online survey respondents (28%) supported exemptions from traffic restrictions for Blue Badge holders.
42. Many respondents – particularly among stakeholders - indicated that they wanted more detail including on potential impacts and the alternatives modes of travel and a reassurance that these alternatives are in place and implemented in a timely way.

Recommended next steps

43. Officers consider that many of the concerns raised at this stage could be addressed and mitigated through careful design of the proposals. And so, in light of feedback received, it is recommended that the following aspects of proposals are considered further and as part of the detailed scheme design and business case. This will also include further engagement and consultation (as outlined further below) to ensure proposals meet wider objectives but also provide transport and environmental benefits to those directly affected including residents, employees or employers.

Traffic restrictions

- The exact location of the traffic restriction points;
- Whether further restrictions or other traffic management schemes are required;
- The timing of the restrictions to determine when they should operate including consideration of these operating all day or just part-time;
- Whether there should be further exemptions and how these would be administered in practice; and
- The supporting transport strategy.

Workplace parking levy

- The level of charge;
- The exact boundary of the WPL;
- Whether there should be any exemptions and/or discounts; and

- The supporting transport strategy including establishing priorities for investment of income raised and, as required by the enabling legislation, a detailed 5-year investment plan and outline plan of investment covering a 10-year period.
44. Several individuals and organisations, including some large employers, expressed support for alternative options, including a congestion charge or expansion of the WPL area. Alternative options will be considered at the next stage, as required as part of the DfT business case process. Any alternative options pursued would need to be deliverable and proportionate, and it is important that any WPL scheme delivers clear benefits to employers who pay for it and their employees.

Financial and Staff Implications

Business case tasks and costs

45. The financial implications of developing a detailed scheme up to and including submission of a draft WPL scheme Order and full business case for approval by DfT is estimated to be £1.602m. This includes a 20% contingency.
46. These costs are specifically associated with:
- Transport & emissions modelling and research
 - Supporting transport strategy development & highway design
 - Social & economic impact assessments
 - Cost & income models
 - Preparation of the business case documentation
 - Stakeholder engagement & consultation, including a possible public inquiry
 - Legal advice & support
 - Project management support
47. Note, this excludes costs associated with further scheme development and implementation following approval by DfT. Further scheme development would include more detailed design of highway schemes (traffic restrictions, bus and cycle priority schemes, and supporting traffic management schemes) which are assumed to be funded by money either secured from the DfT or future WPL income (see para. 50).

Funding the business case

48. Project funding has been secured from the Housing and Growth Deal, as the project supports housing growth and sustainable access in and around Oxford.
49. The DfT have confirmed that costs associated with developing and implementing the WPL scheme can be covered by net proceeds generated by future WPL income up to a period of 10 years. In-year costs, i.e. those incurred when the scheme is up and running and where they directly or indirectly support

the aims and objectives of the Local Transport Plan, can also be deducted from net-proceeds.

Future Engagement and Communications

50. Effective engagement and communications will be critical to developing and securing support for a detailed scheme. Through the recent engagement exercise stakeholders have confirmed they want to be more involved in shaping the WPL proposals and further engagement including with community groups will also be required to better understand concerns and access needs in relation to designing more detailed traffic restriction proposals, both in the city centre and Oxford's Eastern Arc. The LEP and other Oxfordshire district councils will also need to be involved.
51. In 2011 government policy in relation to a WPL was: *"[Government] will require any future [WPL] schemes to demonstrate that they have properly and effectively consulted local businesses, have addressed any proper concerns raised and secured support from the local business community. This will make sure that future schemes will not impose a burden on business."*
52. Therefore, before carrying out formal consultation, and a possible Public Inquiry, further engagement will take place, including:
 - A 'Connecting Oxford Partnership' will be established involving employers and businesses affected by the WPL, including those representing health and education sectors and the private sector. The intention would be to use the Partnership to help shape WPL proposals and to try to accommodate stakeholder requests or at least mitigate their concerns.
 - Face-to-face meetings and other events with resident and community groups, smaller employers and businesses and other stakeholders affected by traffic restrictions and/or WPL, will also be undertaken.
53. In addition, there will continue to be a regular flow of communications through media and social media countywide to ensure high levels of public awareness over the proposals. This will be increased significantly as detailed proposals move towards the next phase of public consultation.

Equalities & Sustainability Implications

54. A Service & Community Impact Assessment (SCIA) has been completed, see **Annex 4**. The precise impacts of the proposals will depend on the details of the final scheme and the package of infrastructure and services that it enables or directly funds and supports. As part of the business case process an Equalities and Distributional Impact Assessment will be carried out to ensure impacts are fully captured.
55. However, positive outcomes are expected because WPL funds will enable a range of major transport projects, which will greatly improve the city's

accessibility, particularly by public transport, walking and cycling, and in areas where access other than by car is particularly poor such as Oxford's Eastern Arc. This will increase the number and quality of travel options available to the public, particularly for those without access to a car. As at paragraphs 31 & 32, it is also proposed that WPL income is used to provide a range of employer and employee benefits reducing the impact of the charge, and for those in scope, the cost of using bus services and Park & Ride.

56. Access restrictions and WPL, and the transport projects it can fund, will also have positive benefits for air quality and pollution by helping to reducing traffic levels and by encouraging more people to travel by public transport, walking and cycling. So also increasing uptake of more active travel options, which would have both mental and physical health and wellbeing benefits.
57. The main potential negative impact might be the increased cost, duration and length of car journeys. It is possible there is a negative impact on recruitment and retention of staff and those undertaking operational travel, including those working for the council. Any impacts would have a different effect depending on the individual or group affected. However, there is a greater risk to the economy and employment in not taking action to reduce traffic volumes.
58. The Service & Community Impact Assessment confirms the following actions will be taken as a result of the assessment:
 - Detailed modelling and economic/social impact assessments;
 - Further discussion with communities/individuals at risk of negative impact and groups representing them;
 - Formal consultation to include all communities/individuals at risk of negative impact, and groups representing them; and
 - Consideration of changes to the proposals, including discounts and exemptions, to address residual risks identified after actions above have been completed.
59. The Connecting Oxford proposals to reduce traffic and congestion would reduce traffic emissions because there would be fewer vehicles on the road, covering fewer miles. Vehicles also emit less pollution in free-flowing traffic than they do in congested stop-start conditions. Connecting Oxford would therefore significantly reduce road transport emissions in and around Oxford, contributing to better air quality and reducing the city's contribution to climate change.

Legal Implications

60. The scheme development will be led by the county council as the Transport Authority. The county council's own Legal team will provide legal advice and support on the scheme with external support also brought in including to help draft the WPL scheme Order.

Risk Management

61. The councils are at a relatively early stage in developing these proposals and, whilst a project risk register has been established, a full risk assessment has not been undertaken. A thorough analysis of risks associated with Connecting Oxford will however be undertaken as part of the business case which will be prepared at the beginning of the project and updated throughout. It will also be presented to county and city Cabinets later in 2020.
62. At this stage, there are potential risks around the economic impact and potential for proposals to effect economic growth in the city and beyond. This may reduce opportunities for retention and growth in local employment opportunities. There is however no evidence that traffic restrictions introduced in Oxford city centre in 1999 had this effect, nor has this been the result in Nottingham; recent reporting in the Financial Times in fact confirms that since Nottingham introduced a WPL in 2012 the number of businesses has increased by almost a quarter (+2,350) and there has been a net increase in jobs of 23,400.
63. However, there is a greater risk that business and jobs growth will be constrained if congestion continues to increase and further transport capacity and improved connectivity does not materialise. For example, the OTS estimates that by 2031, under a do-nothing scenario, the impact of the resulting congestion is forecast to result in a loss of around £150 million from the economy of the city per year. Car journey times from the surrounding Oxfordshire towns are also anticipated to increase on average by 18% to the city centre and 14% to Headington.

Timetable

64. The proposed project programme is at **Annex 5**, with an outline of key milestones given below.

21st and 22nd January 2020 – county and city councils Cabinets to decide whether and how to proceed developing Connecting Oxford.

January-October 2020 – develop more detailed proposals and continue discussions with stakeholders.

Winter 2020/21 - formal consultation on a detailed proposal.

May/June 2021 - possible Public Inquiry.

Autumn 2021 - request for Department for Transport approval (as required).

65. The programme allows time to develop a scheme that is right for Oxford, and – more importantly – allows time for the council to talk to the city's employers, Oxfordshire residents and other stakeholders to shape and build support for the scheme before proceeding.

66. In addition to reports to county and city Cabinets at appropriate stages, monthly or more regular Project Steering Group meetings will take place with county and city members including the county's Cabinet Member for Environment and Cabinet Member for Finance, and the city's Cabinet Member for Planning and Transport and Cabinet member for Zero Carbon Oxford. And whilst the Project Steering Group will give overall strategic direction for the project, any final decisions including on matters concerning consultation and implementation will be made by the county's Cabinet.
67. If the councils are satisfied that the case has been made and sufficient support from employers has been secured, specifically linked to the WPL, then a draft scheme Order will be submitted to the Secretary of State for Transport (who must approve the scheme) around autumn 2021.

SUE HALLIWELL

Director for Planning & Place

Background papers: none

Contact Officer: Joanne Fellows, Infrastructure Locality Lead – Central Oxfordshire

December 2019

Connecting Oxford Proposals



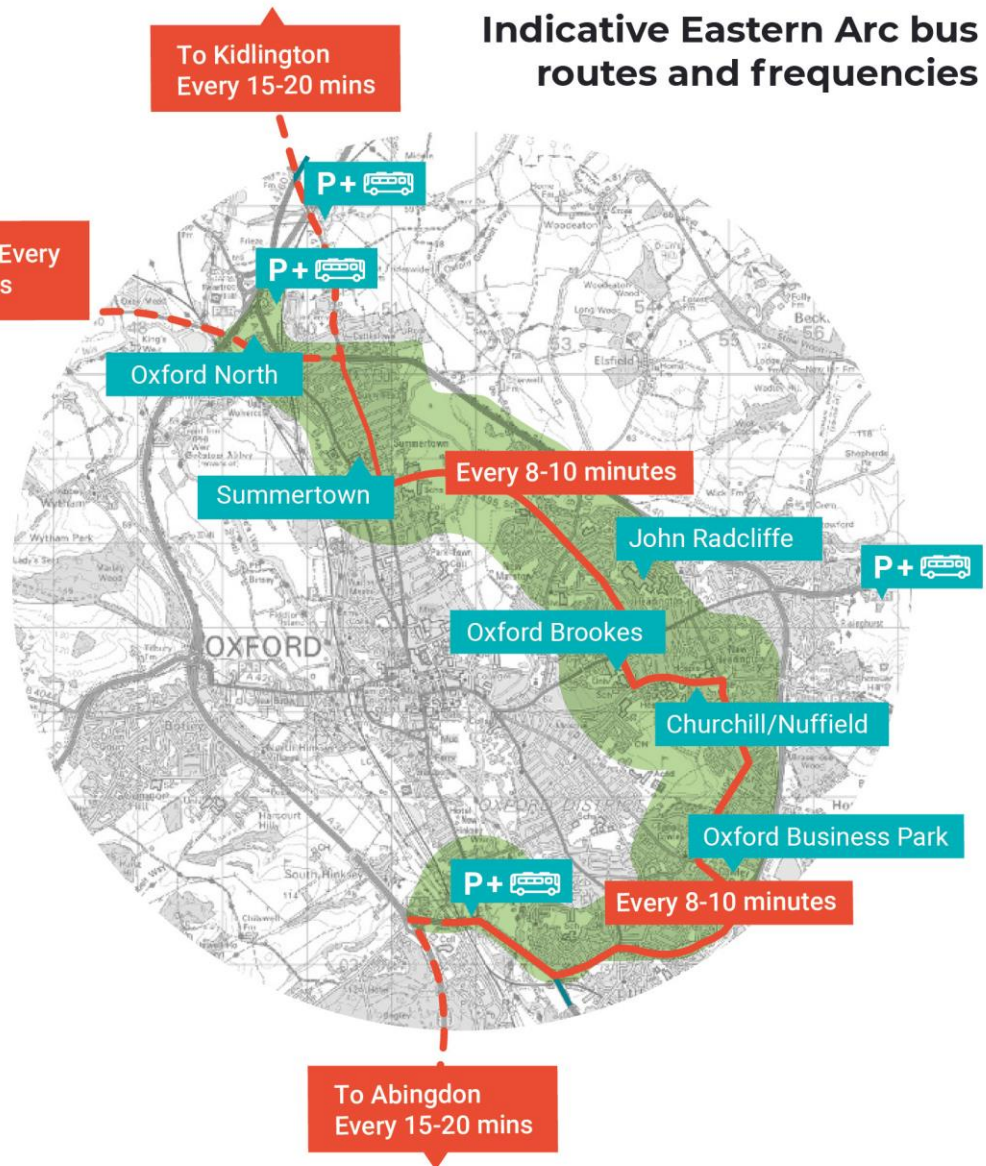
Traffic restrictions

- Where the road would be closed to most traffic in both directions
- Buses, cyclists, taxis and private hire vehicles, and all emergency vehicles, would be allowed to pass through the restrictions (there could be other exemptions for other vehicles)
- The traffic restrictions might not be in effect all the time, and the timings might not be the same at all of them

Workplace parking levy (WPL)

- A WPL is an annual charge paid by employers for each parking space they provide, on or off-site, that is used for employee (commuter) car parking.
- Operational parking is exempt from a WPL as are fleet, visitor and customer car parking spaces
- Employers, not employees are responsible for paying the WPL charge

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Employers in the WPL area would benefit from:

- Grants for on-site sustainable transport improvements (e.g. cycle parking, showers, lockers)
- Grants for on-site car parking management (e.g. monitoring & enforcement systems)
- Access to a Travel Plan advisor dedicated to the WPL zone

Employees in the WPL area would benefit from:

- Discounts on bus fares
- Discounted P&R fares
- Reserved P&R parking
- Discounts on bike purchases

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Oxfordshire County Council Oxford City Council

Connecting Oxford: Report of Engagement

November 2019

Executive summary

Oxfordshire County Council and Oxford City Council launched their [Connecting Oxford](#) proposals on 18 September 2019 and sought views from the public and stakeholders. The engagement period lasted until 20 October 2019.

All of the feedback has been analysed by the Connecting Oxford project team, however this report of engagement seeks only to summarise the feedback – with the complete dataset of responses retained should the Connecting Oxford strategy advance into the more detailed planning and design stage.

A copy of the Connecting Oxford questionnaire is provided at the end of this report.

Key facts

- A total of 2932 respondents completed and submitted the online survey.
- 95% of responses were completed in a personal capacity. The remaining 5% were completed on behalf of a business, employer or other organisation.

Where do people live?

- Most respondents lived within or immediately surrounding Oxford (OX1 to OX4 accounted for 64% of postcodes).
- The most frequently recorded postcode was OX2 - 22% of respondents.
- There were also clusters of respondents living in major Oxfordshire towns and villages including Thame, Faringdon, Chipping Norton, Kidlington and Henley-on-Thames.

Gender and age

- There were more female respondents (55%) than male respondents (45%).
- Just under half of the respondents who provided their age range were between 35-54 years old. This age range is also the largest in Oxfordshire, accounting for 40% of the population.

Main travel purpose

- 56% of respondents indicated that their main travel purpose was 'commuting to and from work'. A further 1 in 4 respondents said their main travel purpose was shopping, leisure and tourism.

Main mode of travel

- 35% of respondents indicated that their main mode of travel was 'car all the way to my destination'. 32% said 'bicycle'. 'Bus' was selected as the main transport mode by 11% of respondents.

Disability

- 9% of respondents indicated that they have some form of disability.

Views on Traffic restrictions

Those responding in a personal capacity

- Overall, more of those responding in a personal capacity thought that the proposed traffic restrictions would make their journey worse (42%) than better (33%).
- For those respondents living in Oxford, 40% thought the traffic restrictions would make their journey worse and 39% thought they would be better.
- Views on traffic restrictions varied according to mode of travel:
 - 75% of those responding whose main mode of travel is car considered the traffic restrictions would make their journeys worse; 5% thought their journey would be 'better'.
 - 25% of those responding whose main mode of travel is not car (or car for only part of their journey) consider that the traffic restrictions would make their journeys worse; 48% thought their journey would be 'better'.
- Frequently stated reasons why people felt the traffic restrictions would make their journeys better were:

Better and safer cycling; better bus travel; less pollution and better air quality; reduced traffic and congestion
- Frequently stated reasons why people felt the traffic restrictions would make their journeys worse were:

Reduced access; longer journeys and increased costs; displacement of traffic and congestion; increased pollution and carbon emissions; lack and high cost of non-car alternatives, impact on local economy and jobs

Those responding on behalf of an employer, business or other organisation

- 53% of those responding on behalf of organisations indicated that proposed traffic restrictions would make transport in Oxford worse

- 26% indicated that the traffic restrictions would make transport in Oxford journeys better
- Frequently stated reasons why people representing an organisation felt the traffic restrictions would make their journeys worse were:

Congestion on alternative routes, possible difficulties with operational access, staff access and recruitment/retention concerns, worsening pollution where traffic is displaced and lack of public transport alternatives to existing car journeys that would be prevented

- Frequently stated reasons why people representing an organisation felt the traffic restrictions would make their journeys better were:

Reduced traffic and congestion, better walking and cycling provision, reduced pollution and better public transport provision

Views on workplace parking levy

Those responding in a personal capacity

- Overall, more of those responding in a personal capacity thought that the proposed workplace parking levy would make their journey better (36%) than worse (25%).
- For those respondents living in Oxford, 43% thought the workplace parking levy would make their journey better and 18% thought they would be worse.
- Views on the workplace parking levy also varied according to mode of travel:
 - Just under 50% of those responding whose main mode of travel is car considered the workplace parking levy would make their journeys worse.
 - 50% of those responding whose main mode of travel is not car consider that the traffic restrictions would make their journeys better; 12% felt that their journeys would be worse
- Frequently stated reasons why people felt the workplace parking levy would make their journeys better were:

Better bus travel; behaviour change; reduced traffic and congestion; better and safer cycling
- Frequently stated reasons why people felt the workplace parking levy would make their journeys worse were:



Increased cost of travelling/living; impact on economy and businesses; uncertainty over required improvements to public transport and other non-car modes; negative impact on people who need to use a car; possible displaced car parking.

Those responding on behalf of an employer, business or other organisation

- 34% of those responding on behalf of an organisation indicated that the proposed workplace parking levy would make transport in Oxford better
- 32% indicated that the WPL would make transport in Oxford worse
- Frequently stated reasons why people representing an organisation felt the workplace parking would make their journeys better were:

Better public transport, reduced traffic and better conditions for walking and cycling

- Frequently stated reasons why people representing an organisation felt the workplace parking would make their journeys worse were:

The impact of the local economy, staff access/recruitment and retention and lack of non-car travel alternatives

Letter and email comments from stakeholders/organisations

- 45 stakeholder groups submitted responses to the Connecting Oxford proposals either instead of or in addition to the online questionnaire. Of the very many comments made on the proposals, the most frequently raised were as follows:

General support for the objectives of Connecting Oxford
 More information on proposals needed
 Stakeholder input needed/offered as proposals develop
 WPL area should cover further areas within the city
 WPL could have an unfair impact on businesses

Introduction

Oxfordshire County Council and Oxford City Council launched their Connecting Oxford proposals on 18 September and sought views from the public and stakeholders. The engagement period lasted until 20 October and in total, 2932 online responses were received. Some further written feedback was received in emails and letters.

All of the feedback has been analysed by the Connecting Oxford project team, however this report of engagement seeks only to summarise the feedback – it does not go into detail on all of the feedback received (this report does not summarise the response to all questions, mostly for GDPR reasons).

There is a lot of detail provided in the feedback received and a wide range of opinion on the proposals. It is recognised that whilst this report summarising responses is very useful for observing patterns and themes, the complete dataset of responses needs to be retained and referenced for deeper analysis should the Connecting Oxford strategy advance into the more detailed planning and design stage.

A copy of the Connecting Oxford questionnaire is provided at the end of this report.

About you and your organisation (Questions 1 – 17)

All respondents to the online survey had the opportunity to complete questions about themselves, and where applicable, the employer, business or other type of organisation that they represented. The following provides a summary of responses.

Question 1 - About you

Out of 2932 online responses received, 95% were completed in a personal capacity. The remaining 5% were completed on behalf of a business, employer or other organisation.

Question 6 - respondents' home postcode

A recognisable home postcode was provided by 2798 respondents (95%)

Figure 1: Respondents' home location postcode

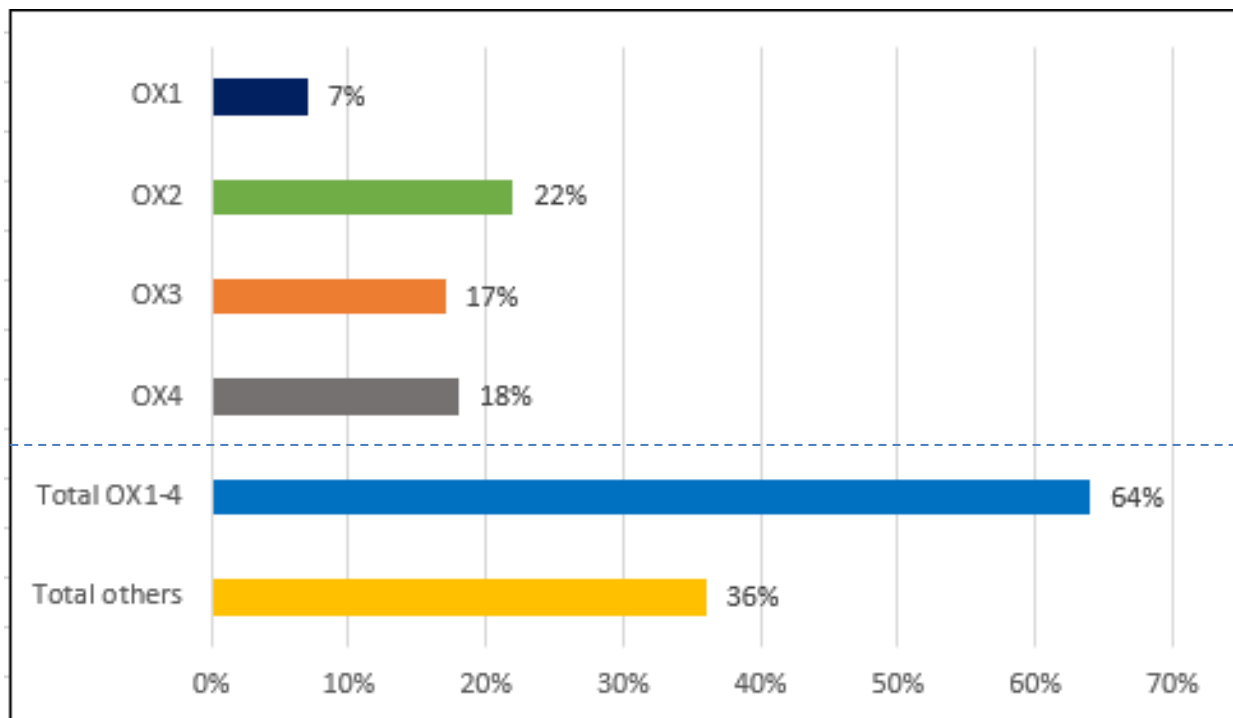
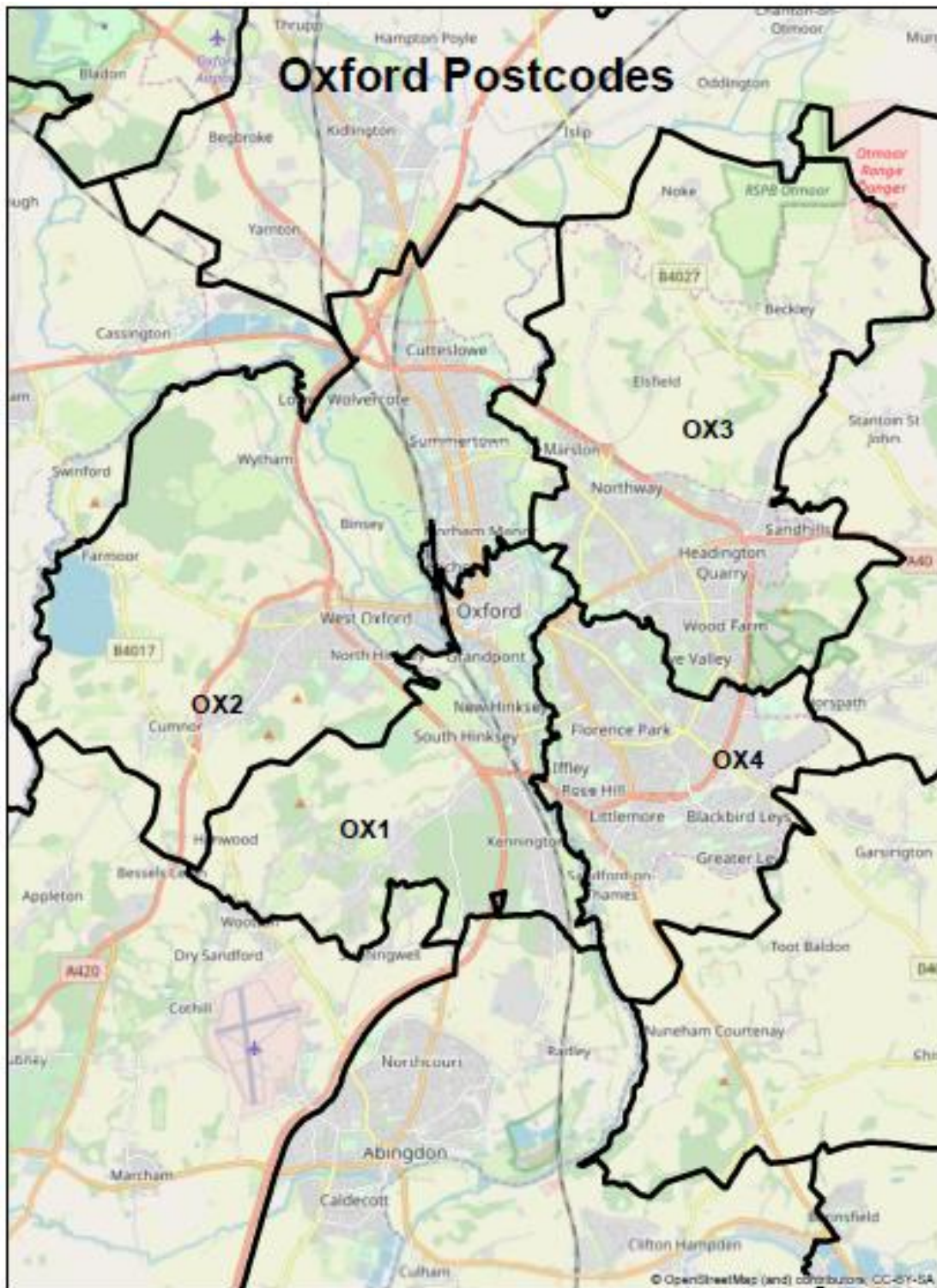


Figure 2: OX1-4 postcode boundaries for reference



- Most respondents lived within or immediately surrounding Oxford as indicated by the home postcode provided (OX1-4 accounted for 64% of postcodes).
- The most frequently recorded postcode was OX2 (an area north and west of Oxford covering Cutteslowe, Summertown, Jericho, North Hinksey, Dean Court, Botley and Cumnor), with 22% of respondents providing this as their



home postcode. Nevertheless, there is a good spread of responses from residents living across the city and in all areas likely to be affected by proposals (see Figure 4).

- There are also clusters of respondents living in other major Oxfordshire towns and villages including Thame, Faringdon, Chipping Norton, Kidlington and Henley-on-Thames (see Figure 3).

Figure 3: Home postcode distribution across Oxfordshire (for respondents answering by online survey or email/letter)

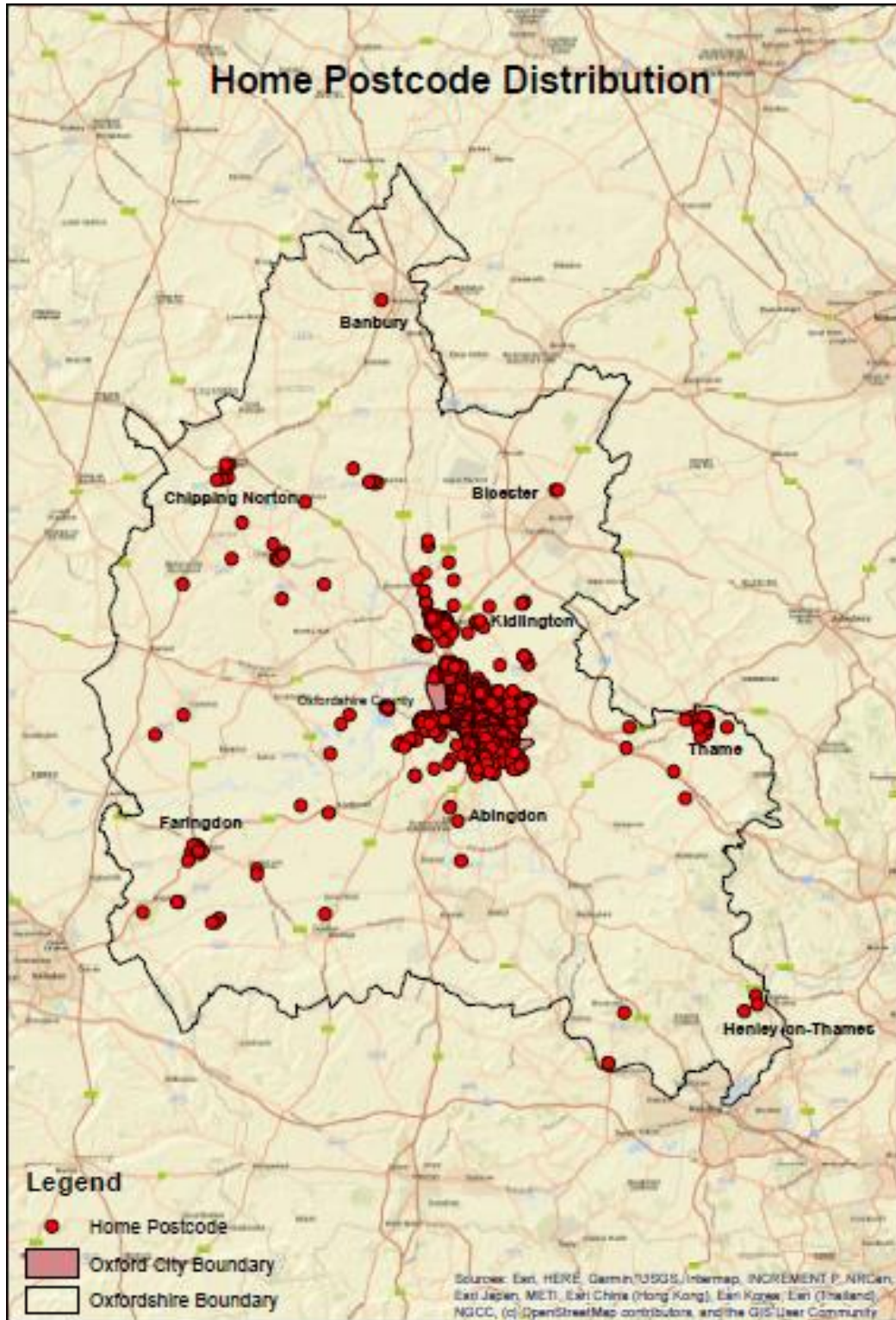
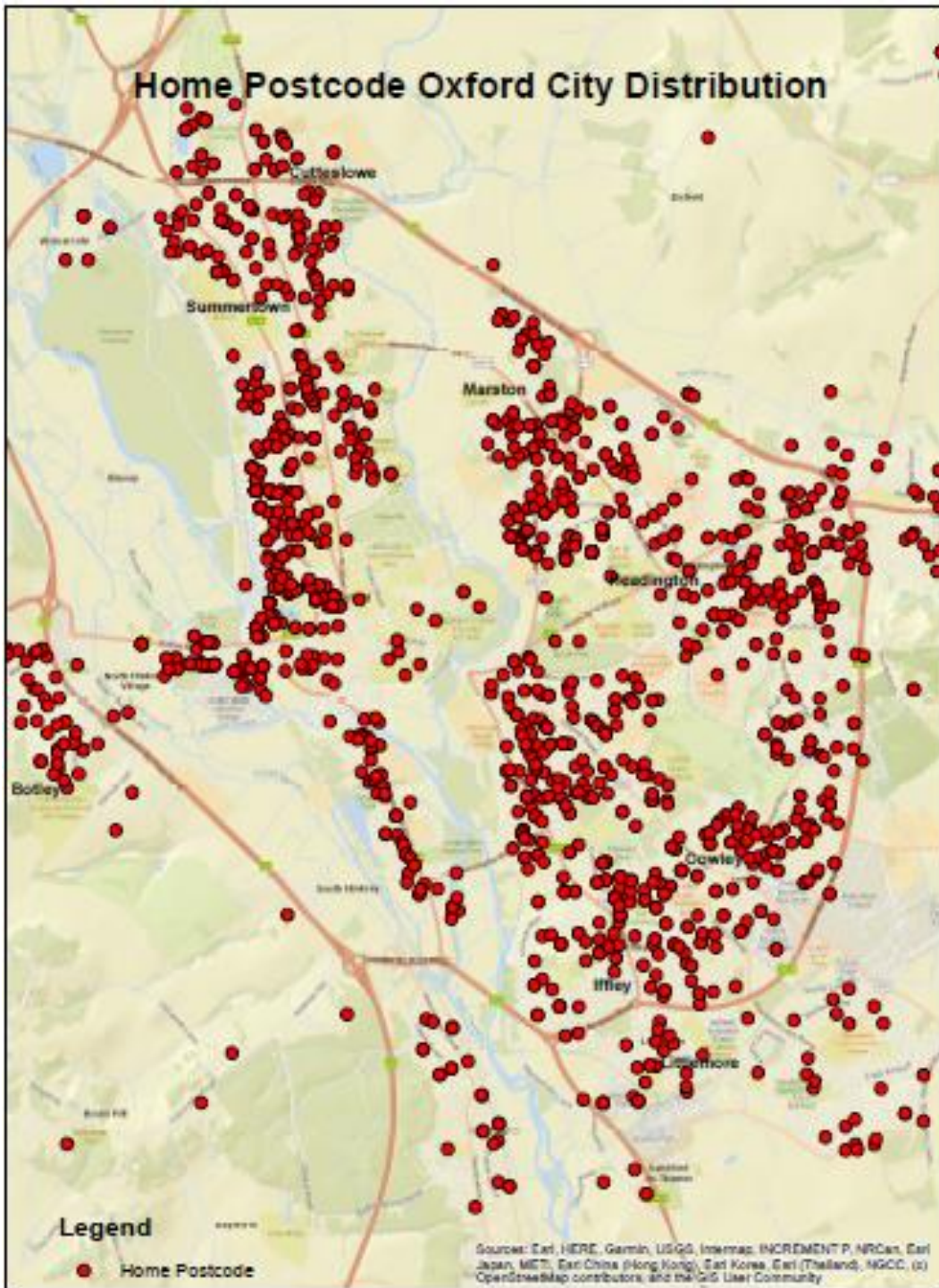


Figure 4: Home postcode distribution across Oxford City (for respondents answering by online survey)



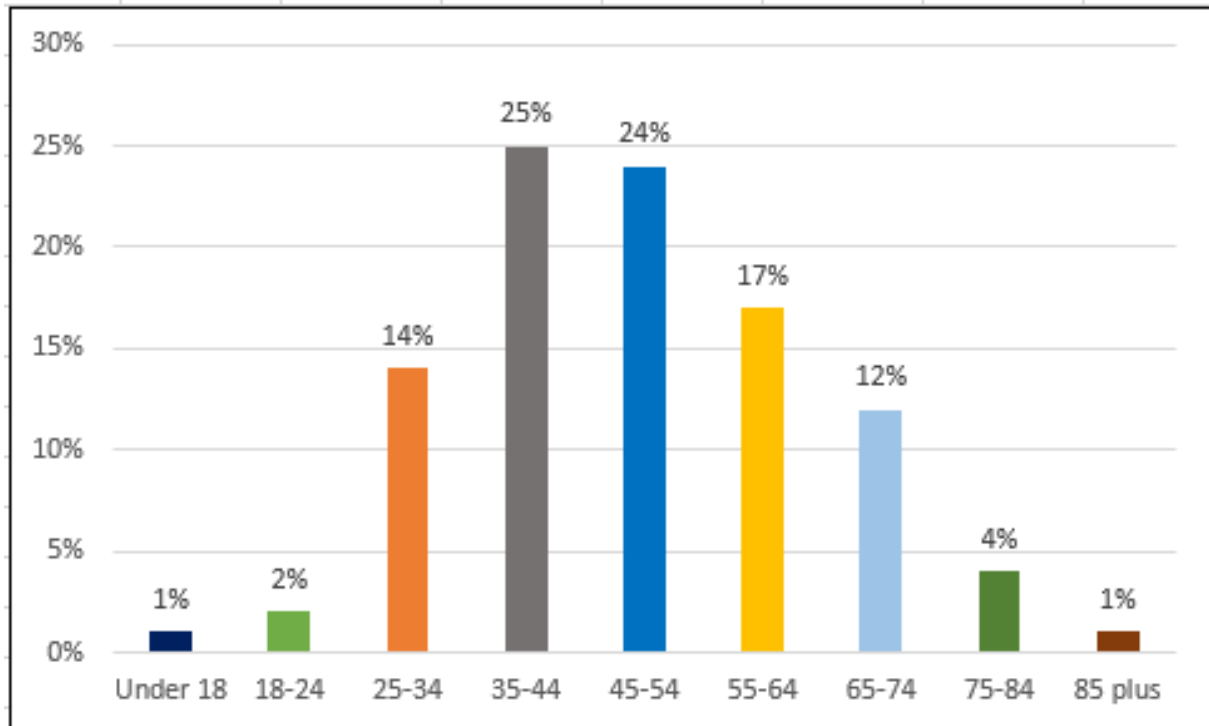
Question 9 - respondents' gender

2035 respondents answered the question on their gender (69%). There were more female respondents (55%) than male respondents (45%).

Question 10 - respondents' age

2033 respondents (69% of the total) answered the question on their age

Figure 5: Respondent's age



Just under half of the respondents who provided their age range were between 35-54 years old. This age range is also the largest in Oxfordshire, accounting for 40% of the population (Office for National Statistics census data, 2011).

- The age range between 18-24 years is greatly underrepresented in survey responses at just 2% of the total. This compares to 20% of the Oxford total population falling in this age range, and 10% of the Oxfordshire countywide population.
- 39% of survey responses were from 25-44 years old compared to 32% of the Oxford population and 28% of the Oxfordshire countywide population.
- The age band between 45-64 years is overrepresented in the survey with 41% of survey responses between these ages compared to 18% of the Oxford population and 25% of the Oxfordshire countywide population.

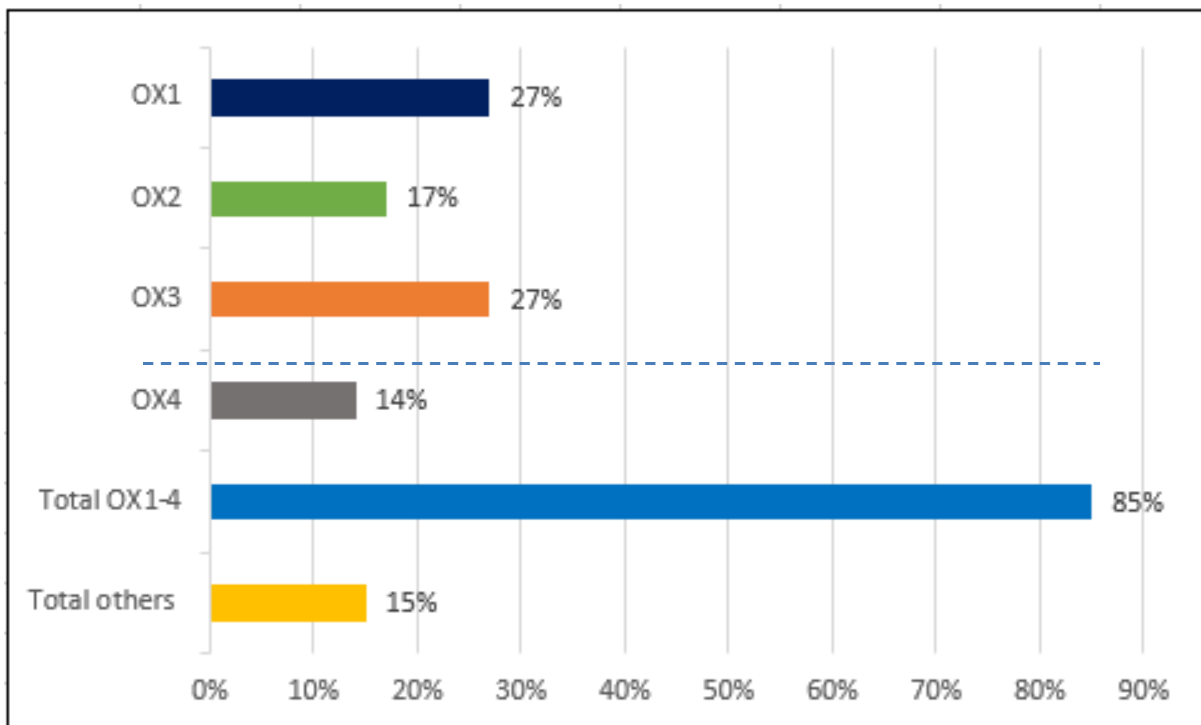
Question 14 - respondents' disability status

1874 respondents answered the question on disability (64%). Only 9% of respondents indicated that they have some form of disability.

Question 19 - Respondents' work location

Only respondents who completed the online survey in a personal capacity were asked to provide a postcode of their normal place of work, if this was applicable. A recognisable work postcode was provided by 1556 respondents (53%).

Figure 6: Respondents normal place of work by postcode



- Most respondents providing a work postcode indicated that their normal place of work is within the area covered by postcodes OX1-4 (85%).
- Over half of respondents' normal place of work is within the area covered by postcodes OX1 and OX3 (53%).
- There is a net outflow of respondents from areas covered by the OX2 and OX4 postcodes, with more respondents travelling from rather than commuting to these locations for their normal place of work (5% more travelling from OX2 and 4% more travelling from OX4).

Figure 7: Normal place of work postcode distribution across Oxfordshire

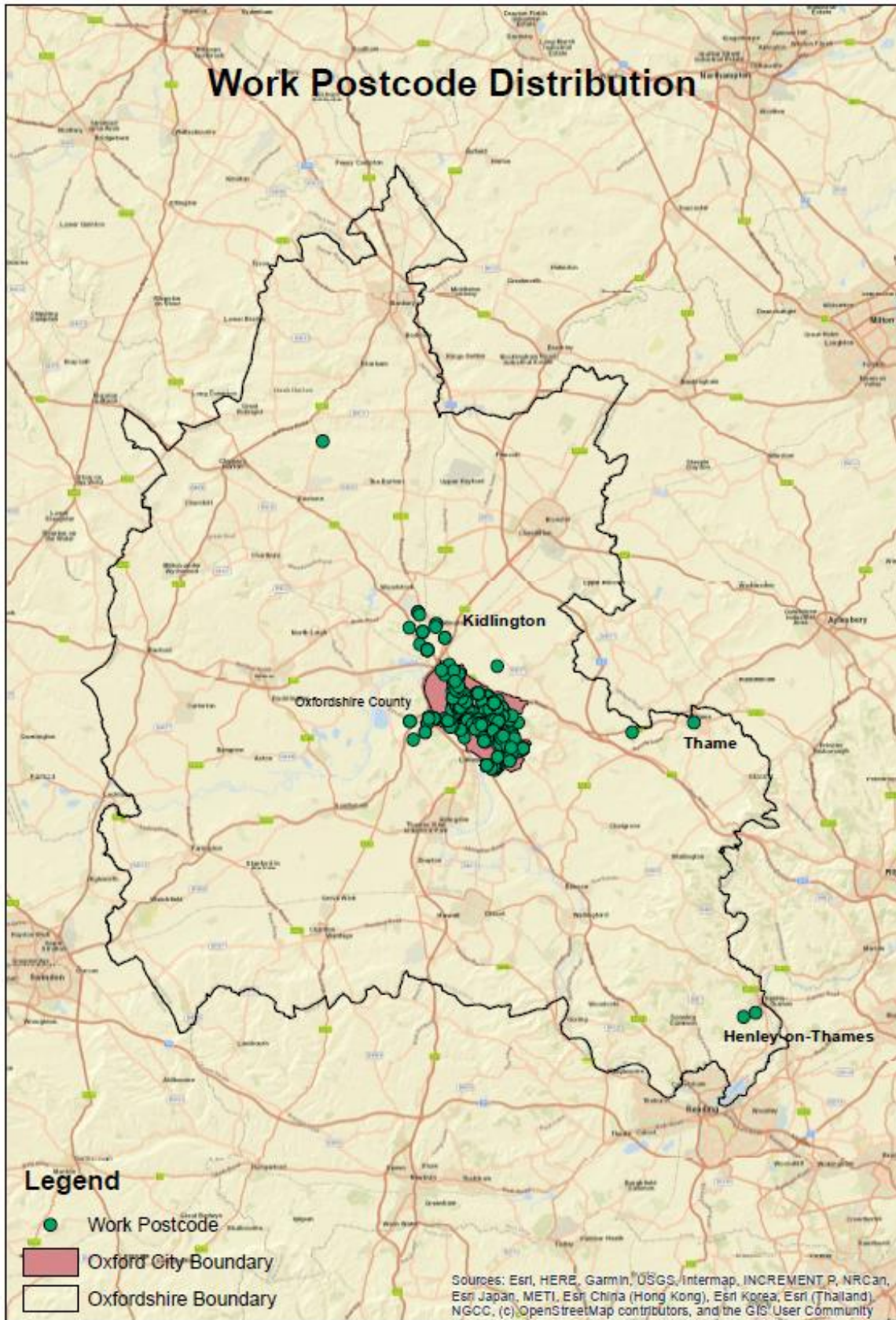
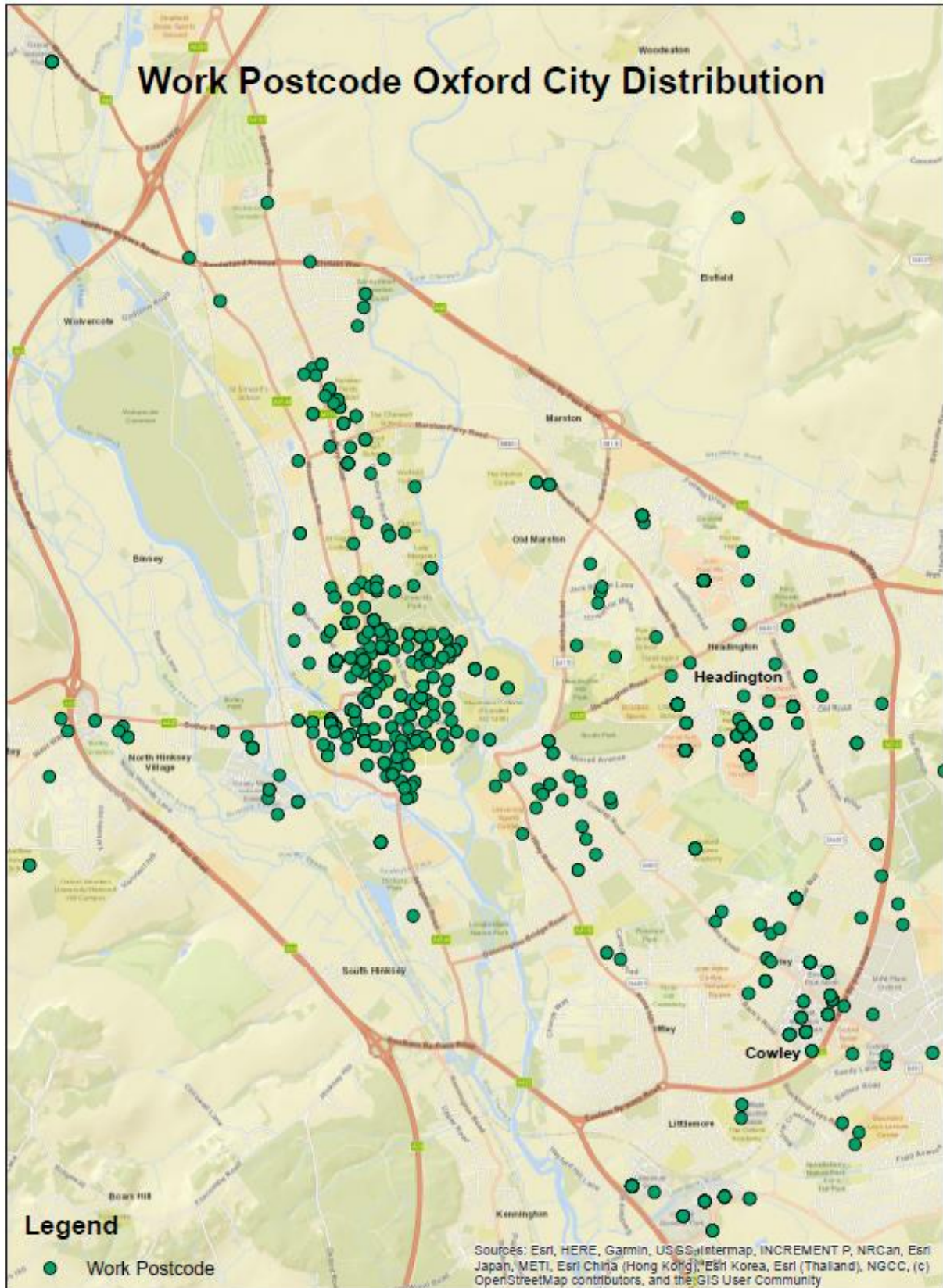


Figure 8: Normal place of work postcode distribution across Oxford City





- Of the respondents who provided a postcode for their normal place of work within Oxford, most are in the centre of the city; reflecting the greater number of different employers/more discrete places of work in the city centre.
- The remaining work postcodes provided are mostly dispersed across Oxford's Eastern Arc including in:
 - Headington- predominately at the hospital locations
 - Cowley- particularly the Mini plant and surrounding business parks

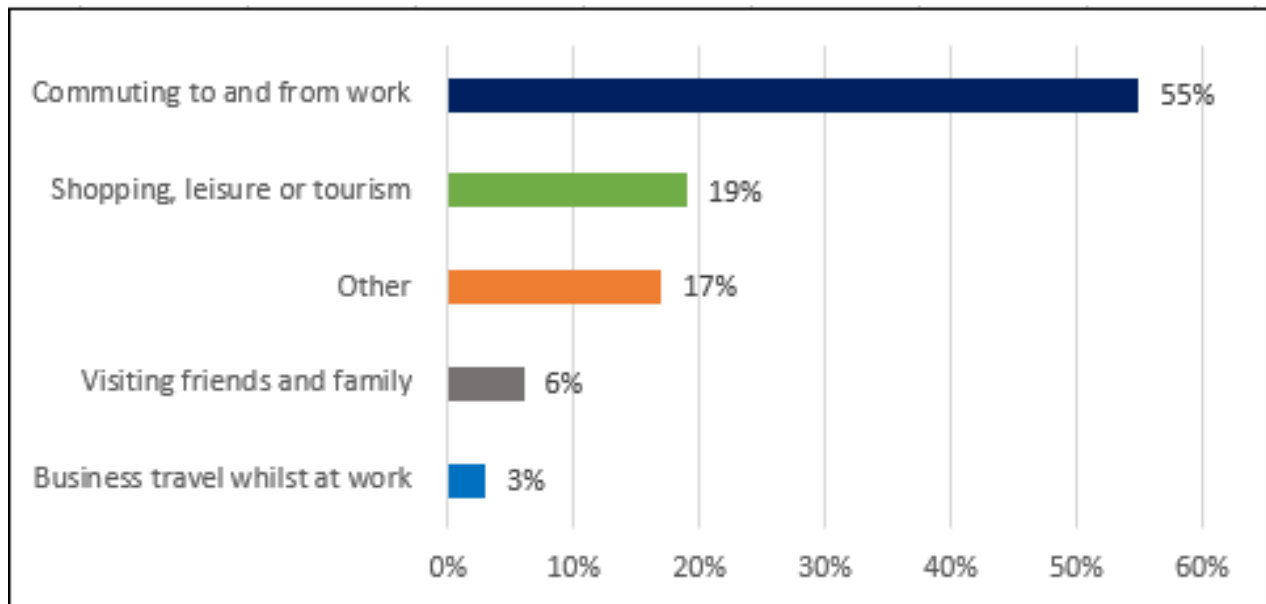
Online survey responses from those responding in a personal capacity (Questions 18 – 22)

The following section relates to respondents who answered questions and provided other feedback in a personal capacity only (2800 respondents).

Question 18 - travel purpose

2800 people answered this question (100% of those responding as individuals).

Figure 9: Travel purpose

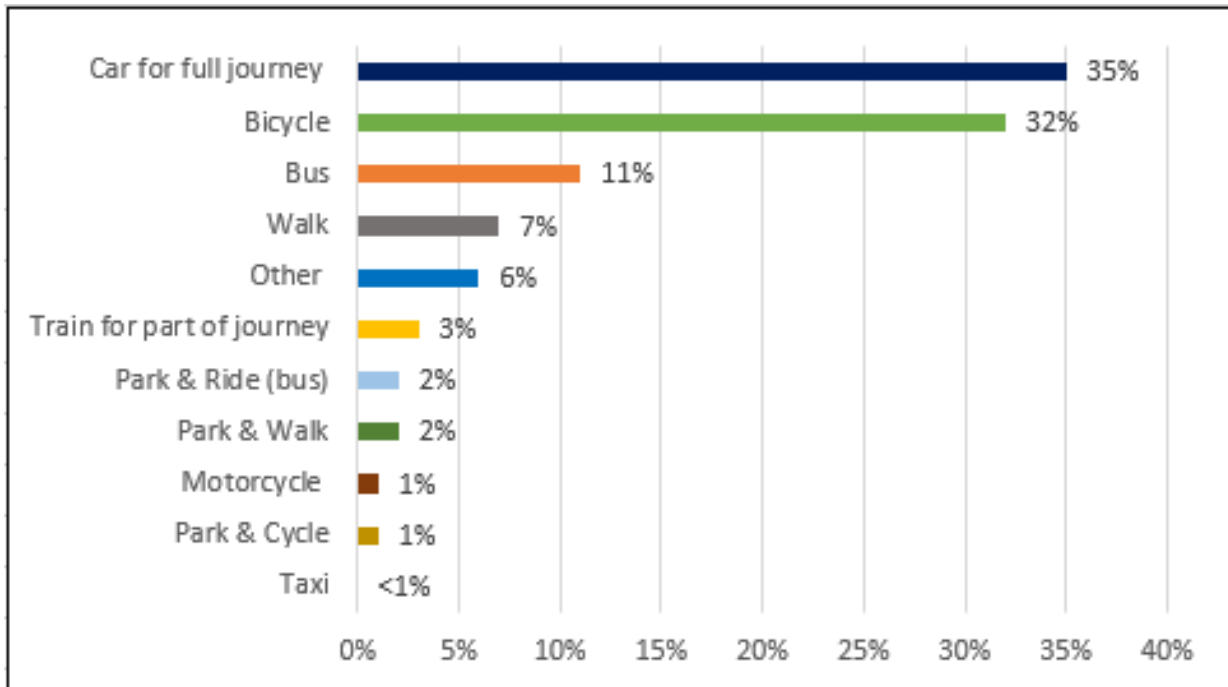


- Over half of the respondents indicated that their main travel purpose was 'commuting to and from work' (56%).
- Similar proportions of respondents indicated that they travelled for 'shopping, leisure and tourism' (19%) or 'other' purposes (17%).
- A small number of respondents selected 'visiting friends and family' (6%) and 'business travel whilst at work' (3%) as their main travel purpose.
- Of those who selected 'other', 5% of respondents mentioned the school run as part of or their sole journey purpose.

Question 20 – how do you most often travel?

2800 respondents answered the question on mode of travel for their main journey purpose in Oxford (100% of those responding as individuals).

Figure 10: Mode of travel

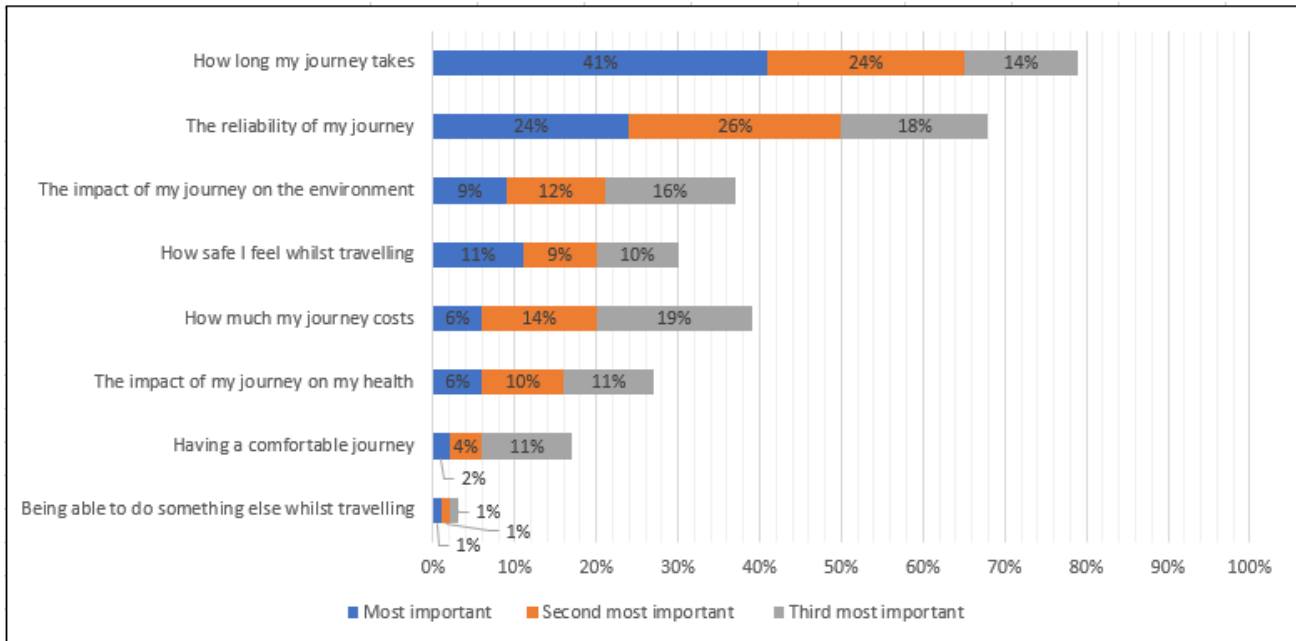


- Most respondents indicated that their main mode of travel was 'car all the way to my destination' (35%) or 'bicycle' (32%).
- 'Bus' was selected as the main transport mode by 11% of respondents.
- There was a relatively even distribution of respondents who 'Park & Ride (bus)' (2%), 'Park & Cycle' (1%) or 'Park & Walk' (2%).

Question 22 – respondents’ priorities when travelling

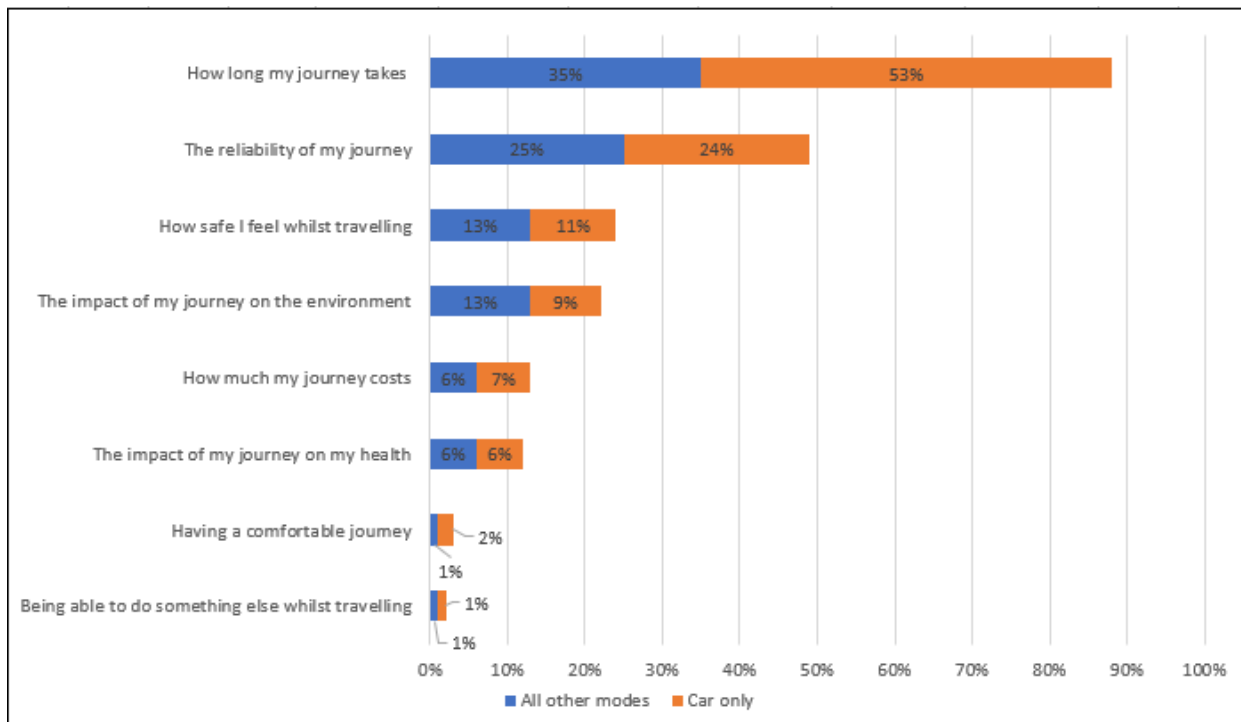
2595 of those who responded in a personal capacity (93%) answered the question requiring ranking of their three most important priorities when travelling in Oxford. Some responses could not be used in the analysis because the question was incorrectly answered including selecting more than three priorities.

Figure 11: Top three important journey priorities for all modes of travel



- ‘How long my journey takes’ is the option selected most often by respondents - 41% indicated that it was their most important priority, and a total of 79% selected this as either their most, second most or third most important priority.
- ‘The reliability of my journey’ is the next most common priority selected by respondents - 68% selected this as their most, second or third most important priority.
- ‘Being able to do something whilst travelling’ is selected the least by respondents - with only 3% choosing this as their most, second or third most important priority.

The following chart shows how priorities of respondents varies according to their main journey purpose in Oxford, so ‘car all the way to my destination’ or all other modes including a car for part of their journey such as ‘car & cycle’.


Figure 12: Most important journey priorities by car only and all other modes


When separating out for those who travel by car only compared to those travel by all other modes journey priorities are still similar, with *'How long my journey takes'* and *'The reliability of my journey'* the most important priorities.

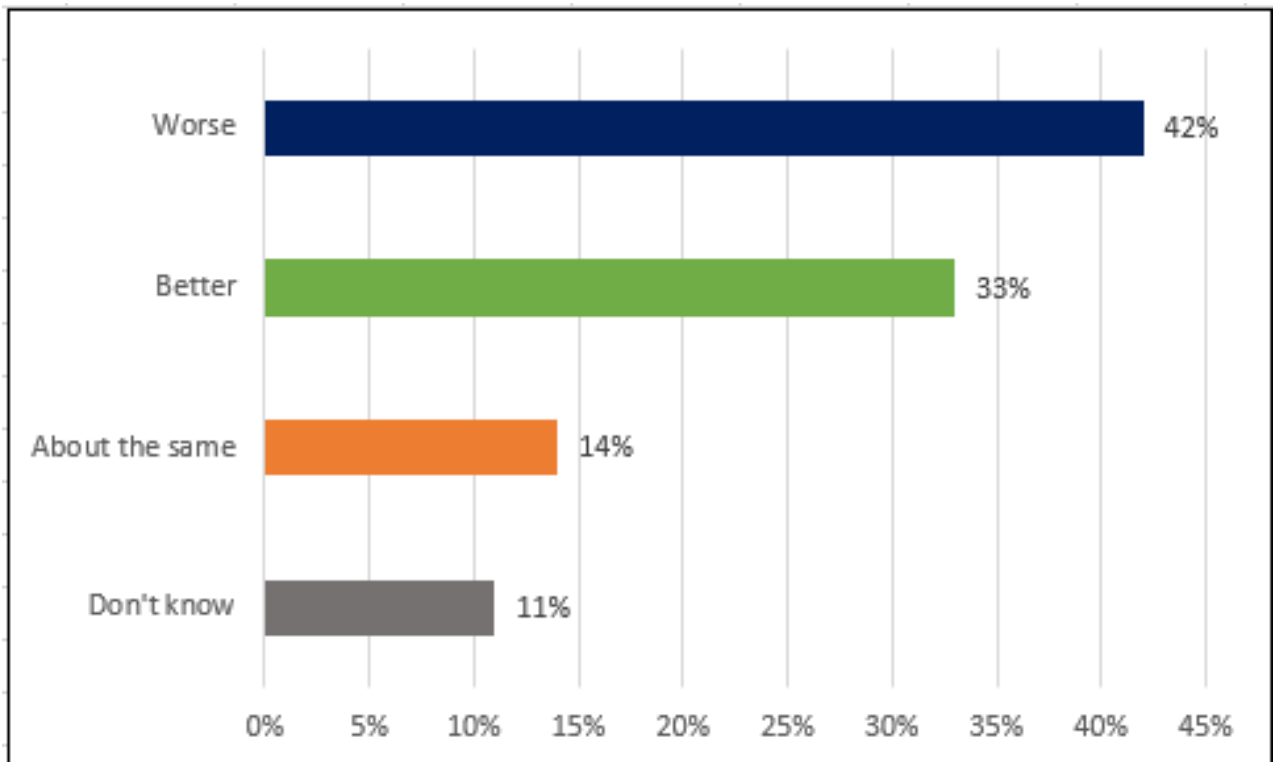
- *'How long my journey takes'* is the most selected priority, with 53% of car users and 35% of other mode users choosing this
- One quarter of other mode users selected *'the reliability of my journey'* as most important (25%), with a similar proportion of car users choosing this priority (24%)
- *'Being able to do something else whilst travelling'* is the least selected priority, chosen by only 1% of car users and 1% of other mode users

Views on traffic restrictions (Question 23)

Question 23 – Views on whether traffic restrictions would make journeys better or worse overall

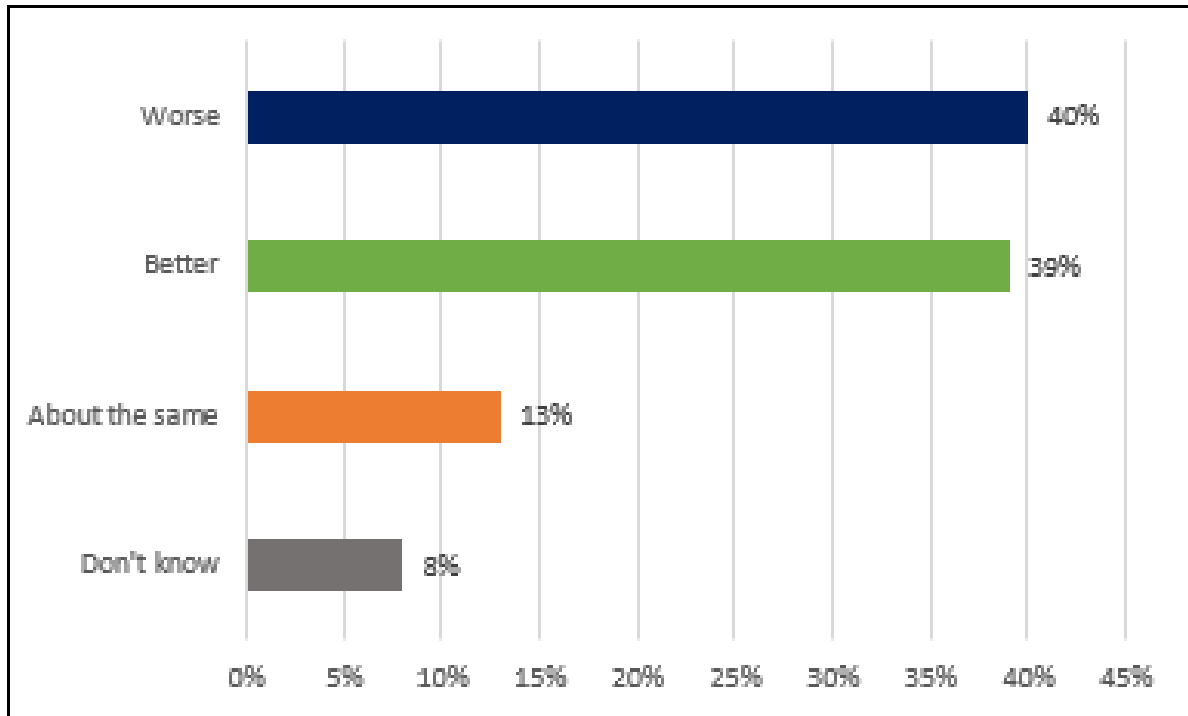
All the 2800 people responding in a personal capacity answered the question on whether they thought traffic restrictions would make their journey better or worse overall, based on their journey priorities.

Figure 13: Personal views on traffic restrictions of all online respondents



- More respondents thought that the proposed traffic restrictions would make their journey worse (42%) than better (33%).
- 14% of respondents did not perceive a change to their journey as a result of the traffic restrictions.
- 11% of respondents did not know the impact of proposed traffic restrictions on their journey.

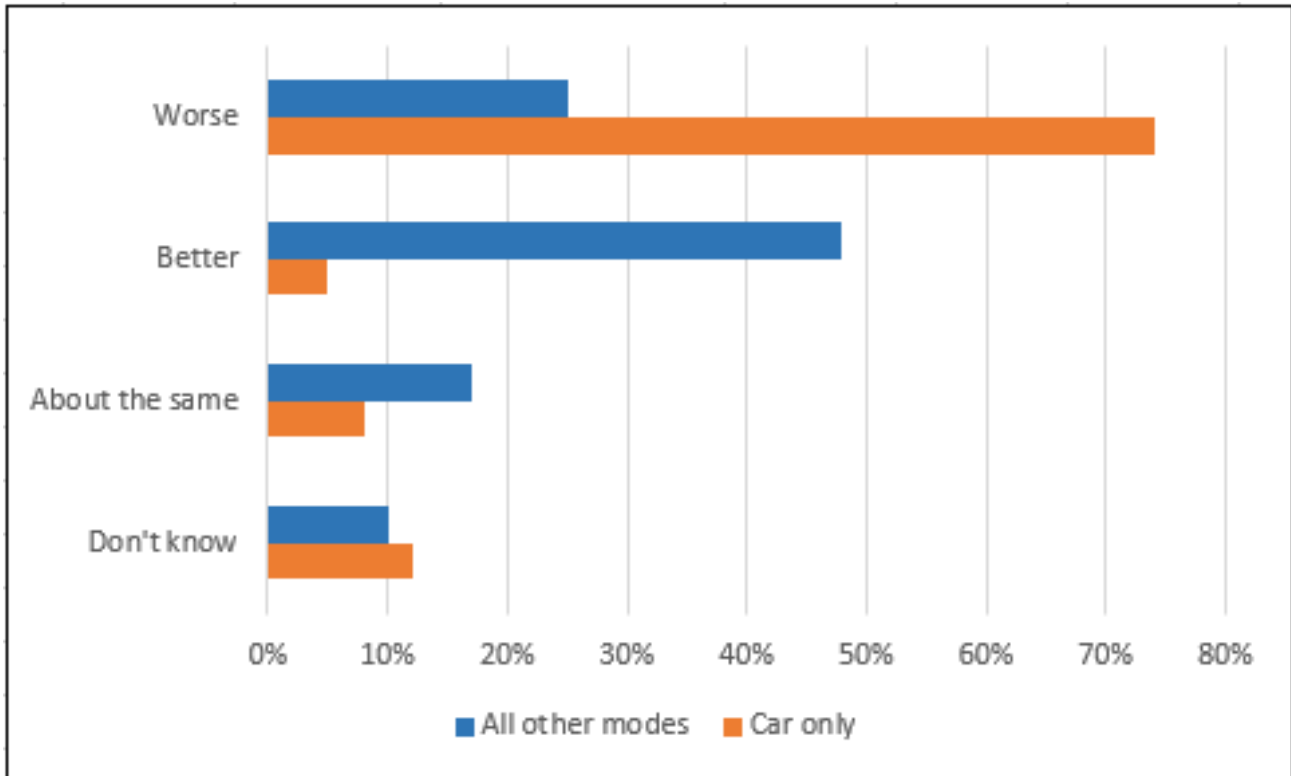
Figure 14: Personal views on traffic restrictions of all online respondents living in Oxford



Compared to all respondents, fewer of those responding to the online questionnaire and stating an Oxford home postcode (OX1 to OX4), considered that the traffic restrictions would make their journeys worse (40%); more considered they would make their journeys better (39%). There were 1881 respondents (67%) who provided an Oxford postcode and answered this question.

The following chart shows how people's views on the traffic restrictions varied by their main mode of travel in Oxford. All other modes included a car for part of the journey such as 'car & cycle'.

Figure 15: Personal views on traffic restrictions of all online respondents travelling by car only and all other modes



The traffic restrictions are viewed differently by different mode users – over 70% of respondents who travelled by car only for their main journey in Oxford thought that traffic restrictions would make their journey worse. This compared to only about 25% of those who used other modes including a car for part of their main journey. Just under 50% of respondents who selected other modes of travel indicated that their journeys would be better with the traffic restrictions

Respondents were subsequently asked why they thought their journey would be 'better', 'about the same', 'worse' or 'don't know' overall with traffic restrictions. A total of 2026 (70%) respondents left comments with a summary of the most common themes set out below.

Traffic restrictions would make journey 'better'

Comment theme, in descending order of number of mentions	Summary of responses
Better and safer cycling	<p>Many respondents thought less traffic would make cycling safer, quicker and easier, including for and travelling with children.</p> <p>Creating more space for segregated cycle lanes was welcomed, however, some respondents were concerned that this might not be fully realised.</p> <p>There was also some concern that more buses could impact on cycle safety.</p>
Better bus travel	<p>Respondents linked less traffic with more reliable and quicker bus services.</p> <p>Some respondents also wanted additional restrictions to speed up buses in places where no restrictions are proposed, for example, in the south east of the city. Other respondents thought that quicker buses would also improve air quality with fewer buses idling in traffic congestion.</p>
Less pollution and better air quality	<p>Respondents said reducing traffic would also improve air quality which would benefit everyone.</p>
Reduced traffic and congestion	<p>Respondents welcomed proposals that reduced traffic and congestion because this would directly benefit cyclists, pedestrians and bus travellers.</p> <p>Some respondents commented that improvements to benefit cyclists, pedestrians and bus travellers need to be in place before the traffic restrictions are implemented.</p>
Healthier and safer travel including on foot	<p>Many respondents thought their journeys on foot would improve, particularly from better air quality and noise because of less traffic. Respondents thought this would mean healthier journeys.</p>



Traffic restrictions would make journey 'about the same'

Comment theme, in descending order of number of mentions	Summary of responses
Unaffected by proposals	<p>Respondents thought that they would not be affected by the traffic restrictions including any potential impacts or benefits. Reasons including living, working or travelling outside areas directly affected including areas to the west (incl. Botley), east and south east of the city.</p> <p>Some respondents also thought their mode of travel would be unaffected including those that use a train or who also travel by bus, on foot or bicycle within or to the city.</p>
Unsure of the benefits and impacts	<p>Some respondents were sceptical that traffic levels could be reduced and/or whether benefits could be realised.</p> <p>Others were also unsure whether there would be benefits beyond the city centre and Oxford's eastern arc, giving Abingdon Road, Botley Road, Cowley Road and Iffley Road as examples.</p>
Proposals won't address all problems or don't go far enough	<p>Some respondents wanted additional traffic restrictions and/or for impacts to benefit the whole city.</p> <p>Some respondents also thought that there was a lack of vision and more could be done to improve walking, cycling and bus travel, for example.</p> <p>Others thought proposals ignored traffic congestion caused by the school run and leisure and shopping trips.</p>
Proposals would benefit some modes but could negatively impact others	<p>Respondents could see benefits to some modes - bus and cycle - but disbenefits to others, including car travel. Respondents were concerned about residents' access, with the traffic restrictions on Marston Ferry Road and Hollow Way mentioned several times in relation to this.</p>
Displacement of traffic &/or congestion	<p>Respondents felt that traffic might reduce in some areas, including the city centre, but were concerned that it would not reduce or could even increase in other areas, particularly those further away from the restrictions including areas to the west (incl. Botley), south and south east of the city.</p> <p>There was particular concern about knocking traffic onto already congested roads. This included the ring road and approaches to the city e.g. A34, A40.</p>


Traffic restrictions would make journey 'worse'

Comment theme, in descending order of number of mentions	Summary of responses
Reduced access	<p>Respondents were concerned about their ability to continue travelling to work, school, shops and other destinations. Concerns included travelling with young children or a member of the family or friend who has a disability or mobility issue, carrying heavy goods and linked journeys e.g. combining the school drop off with the commute to work.</p> <p>Respondents living near the restriction(s) were particularly concerned about access to their homes but also to surrounding shops, schools and GP surgeries and other local services/facilities. Some also felt that restrictions could impact on social relations.</p>
Longer journeys & increased transport costs	<p>Respondents felt that restrictions would increase the length of journeys resulting in additional time and cost of travelling. Those who car share and who might also be affected by the WPL were concerned that it would impact on incomes.</p>
Displacement of traffic & congestion	<p>Concern that traffic would displace to strategic (ring road and approaches) and local roads (including residential streets) and that this would lead to more congestion and poor air quality in those areas.</p>
Increased pollution & carbon emissions	<p>Concern that restrictions would mean people driving further which would increase pollution in certain areas and lead to more carbon emissions overall.</p>
Lack & high cost of non-car alternatives	<p>Respondents, whether they lived in the city or travelled from outside, felt alternative transport options were limited and therefore not viable. Respondents living outside the city thought their options were further reduced with walking and cycling being completely out of scope.</p> <p>Linked to this, respondents felt that improvements to public transport would need to</p>



	<p>be implemented before traffic restrictions were in place.</p> <p>The cost of public transport, particularly bus services and paying for Park & Ride parking, was felt to be expensive and so travelling by car in comparison was considered cheaper.</p>
Impact on local economy & jobs	<p>Some respondents were concerned that restrictions could impact on jobs and the economy, with reduced access and/or additional travel costs affecting whether people or businesses would want to continue working or operating here. Many respondents cited the already high cost of living in or travelling to Oxford as a reason for their concern.</p>
Impact on those with disabilities and/ or other health related issues which impact on mobility	<p>Respondents were concerned about how they would be able to continue travelling to and around the city with restrictions in place. This included those who were disabled or who care for a family member or friend with reduced mobility or other health problems. There was concern that alternatives – bus, cycle and walk – would not be viable options. Many of these respondents saw their access to a car, even for occasional journeys, as being essential.</p>

'Don't know' whether traffic restrictions would make journey 'better', 'about the same' or 'worse'

Comment theme, in descending order of number of mentions	Summary of responses
Unclear of the proposals' impact or of the changes being proposed	<p>Many respondents were unclear of the proposals benefits and impacts either because they felt there was not enough detail or because they were unclear as to what was being put forward and how it might affect the area they live in or journey they made, for example.</p> <p>Many respondents thought there could be benefits, certainly in some areas, but also impacts in others and so wanted to see further analysis of the proposals to make a more informed decision.</p>



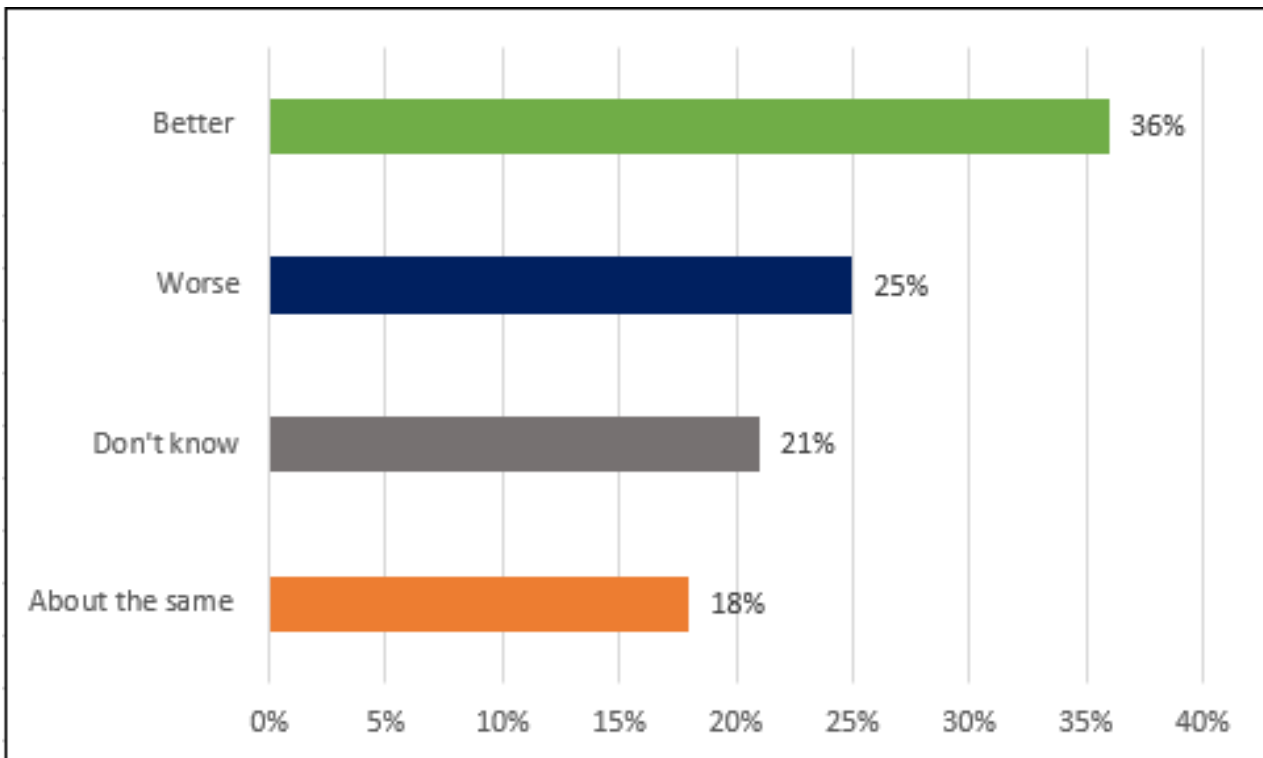
Reduced access	<p>Those respondents who chose 'don't know' were also concerned about their ability to continue travelling to work, school, shops and other destinations, and the impact traffic restrictions could have on even occasional car journeys.</p>
Displacement of traffic & congestion	<p>There was also concern and uncertainty about traffic displacement particularly to residential streets but also the ring road and A34, albeit to a lesser extent. Concerns raised included moving congestion and pollution to other streets.</p>
Whether non-car alternatives would be in place in advance and whether these would be sufficient	<p>Some respondents were unsure whether non-car alternatives would be in place in advance, with many saying they should be particularly improved bus services. Several respondents mentioned the cost of bus travel and lack of bus services as a reason for not choosing these modes currently.</p>

Views on a workplace parking levy (Question 24)

Question 24 – Views on whether workplace parking levy would make journeys better or worse overall

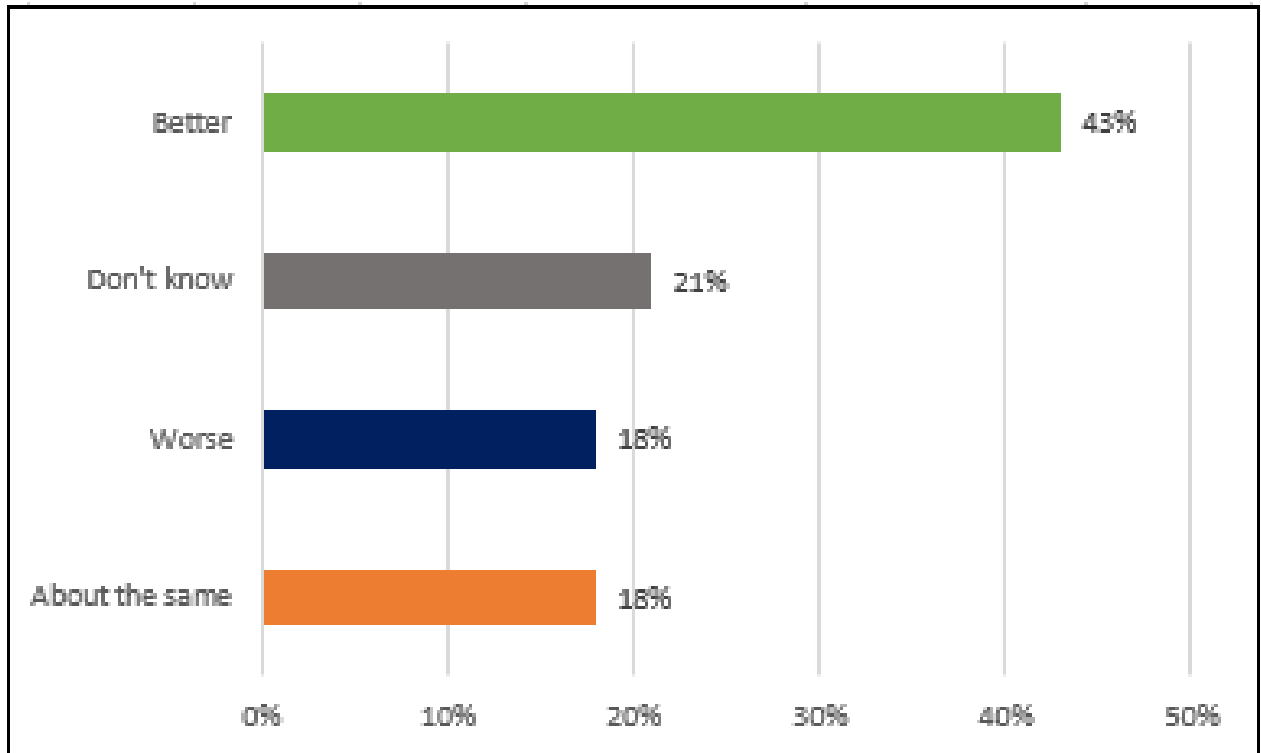
All of the 2800 people responding in a personal capacity answered the question on whether they thought the workplace parking levy would make their journey better or worse overall, based their journey priorities.

Figure 16: Personal views on workplace parking levy of all online respondents



- More respondents believed that the workplace parking levy would make journeys better (36%) than worse (25%).
- The workplace levy is viewed more positively than the traffic restrictions (see Figure 13) by those responding in a personal capacity- 3% more believe that the workplace levy will be better and 17% less indicated their journey would be worse.
- A notable proportion of respondents did not know what impact the workplace levy would have on their journey (21%). This is about twice as many as said they didn't know the impact that the traffic restrictions would have on their journeys (see Figure 13).

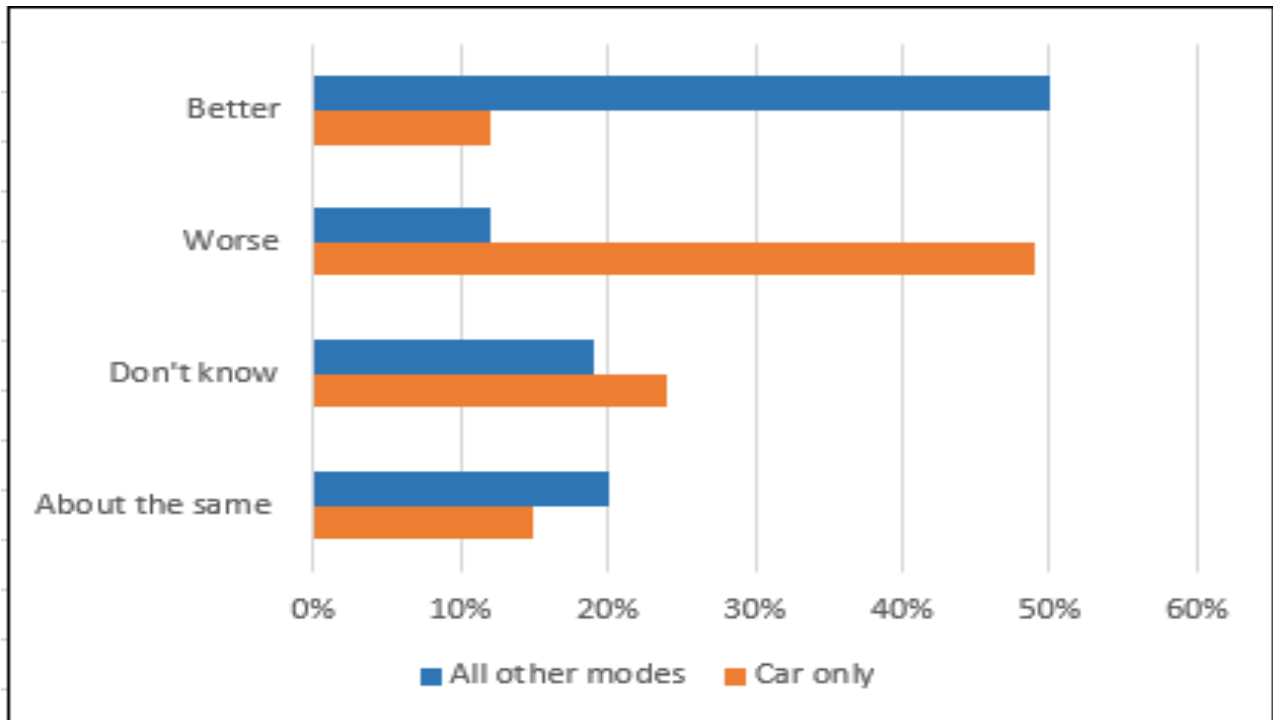
Figure 17: Personal views on workplace parking levy of all online respondents living in Oxford



Compared to all respondents, more of those responding to the online questionnaire and stating an Oxford home postcode (OX1 to OX4), considered that the workplace parking levy would make their journeys better (43%); fewer considered they would make their journeys worse (18%). There were 1881 respondents (67%) who provided an Oxford postcode and who also responded to this question.

The following chart shows how respondents' views about the effect of the proposed workplace parking levy varies according to the main mode of travel. Again, all other modes included a car for part of the journey such as 'car & cycle'.

Figure 18: Personal views on workplace parking levy of all online respondents travelling by car only and all other modes



As with views on the traffic restrictions (see Figure 15), the impact on people's journeys of the workplace parking levy is viewed differently according to mode:

- Almost half of respondents who selected 'car all the way to destination' indicated that the workplace parking levy would make their journeys worse; 12% indicated that they would be better.
- 50% of respondents who selected other modes of travel, including a car for part of the journey, indicated that their journeys would be better, whilst 12% indicated that it would be worse.
- A notable proportion of residents indicated they did not know the impact the workplace parking levy would have on their journey ('car all the way to destination' 24%; other modes 19%).

Respondents were subsequently asked why they thought their journey would be better or worse overall with a workplace parking levy. A total of 1707 (58%) respondents left comments with a summary of the most common themes raised given below.

A workplace parking levy would make journey 'better'

Comment theme, in descending order of number of mentions	Summary of feedback
Better bus travel	<p>Respondents thought they would benefit from both new and improved bus services as well as quicker journeys and better reliability.</p> <p>Some respondents thought that if bus services were more reliable and cheaper this would make them change their travel behaviour.</p> <p>The need for more Park & Ride capacity, as well as free or cheaper parking at Park & Ride sites, was also raised frequently.</p>
Behaviour change	<p>Respondents thought the WPL would bring about a change in behaviour. Either encouraging employers to reduce the amount of car parking they provide or nudge staff to use public transport, walk or cycle to work.</p> <p>Some respondents thought however that the charging level would need to be higher to make a real difference.</p>
Reduced traffic and congestion	<p>Reduced traffic was mentioned frequently, with WPL and investment in non-car modes helping to reduce traffic and congestion.</p> <p>Some respondents linked traffic reduction with road space reallocation, particularly for cycling.</p>
Better and safer cycling	<p>Respondents thought cycle journeys would improve from less traffic but also from investment in cycle infrastructure.</p>

A workplace parking levy would make journey 'about the same'

Comment theme, in descending order of number of mentions	Summary of feedback
Journeys not affected	<p>Some respondents thought their journey would be unaffected because they travelled or worked outside the proposed WPL area. This included those living or working in areas in the west of Oxford city.</p>



	Others thought that their mode of travel would be unaffected including those who walk, cycle and use the train.
Impact on local economy	Respondents thought it was another tax and could impact on the local economy. Some thought this could be overcome if there was real improvement in alternatives. Whilst others were concerned of the potential impact on those on low incomes, with those working at the hospitals and schools mentioned often.
WPL area should be enlarged	Some thought the WPL area should include the city centre and/or areas beyond the ring road. Respondents thought proposals didn't go far enough if these areas were excluded.
No impact in reducing traffic	Respondents thought the WPL would make no difference - either because the WPL area was not large enough or because employers or employees would continue to pay the levy and not reduce parking or change travel behaviour.

A workplace parking levy would make journey 'worse'

Comment theme, in descending order of number of mentions	Summary of feedback
Increased cost of travelling/living if the charge was passed onto employees	<p>Respondents were concerned that the levy would be passed on to them or other employees and the impact this could have on finances, particularly those on low incomes. Some respondents indicated that they already pay for parking at their workplace. The already high cost of living in Oxford and Oxfordshire was also mentioned by some respondents.</p> <p>Some respondents also questioned the fairness given it would only impact on those working in the Eastern Arc of Oxford.</p>
Impact on economy and businesses	Respondents were also concerned about the negative impact of a WPL, particularly on employers and businesses, and the potential impact this could have on discouraging businesses from Oxford and adding to ongoing challenges around recruitment and retention of staff.



	<p>There was also concern that businesses might relocate out of the WPL area to other parts of the city or county.</p> <p>Other respondents thought it was another tax on businesses.</p>
Improve public transport and alternative methods of transport	<p>Respondents felt that changes (both WPL and traffic restrictions) should not be made until public transport and alternative methods of transport, such as walking and cycling, were significantly improved.</p> <p>There was also concern about there being adequate capacity to cope with future demand for bus services and Park & Ride.</p>
Impacting on those who need a car	<p>Respondents felt they or other people needed parking due to a lack of viable alternative methods of transport or needing flexible transport from a personal perspective or employment circumstances e.g. travel for business during their time at work.</p>
Impact of displaced car parking	<p>Respondents thought this might encourage people to park in nearby streets which would impact on residents in terms of increased traffic, congestion & pollution.</p>

'Don't know' if a workplace parking levy would make journey 'better or worse'

Comment theme, in descending order of number of mentions	Summary of feedback
Unaffected by WPL	<p>Many respondents indicated that they would be unaffected by proposals either because they don't commute to a place of work in Oxford's Eastern Arc or are self-employed or retired, for example.</p> <p>Some respondents also thought they would not benefit from improvements either because they did not travel in Oxford's Eastern Arc or because they were unsure if funding would be used to improve their favoured mode of travel. This included those living in areas outside the levy both within and outside Oxford.</p>
Unsure of impact	<p>Some respondents were unsure whether the WPL would reduce traffic and/or raise enough income to fund alternatives.</p> <p>Some respondents were also unclear what a WPL was and whether they or their employer would be affected.</p>



Further detail required	<p>Respondents wanted more information on proposals and their impacts. Without this information some respondents said they could not make an informed opinion on the impact of the WPL. This included knowledge on income it could raise and alternatives it would fund.</p> <p>Linked too this, many respondents felt alternatives need to be provided in advance including better & cheaper bus services and Park & Ride.</p>
Unfair	<p>Respondents thought a WPL was unfair on those it affected including employers, employees, those on low incomes, those who said their job or personal circumstances required travel by car or where no alternative mode of travel is or would be available.</p> <p>Some respondents also thought it was unfair to only include part of the city within the WPL proposal.</p>



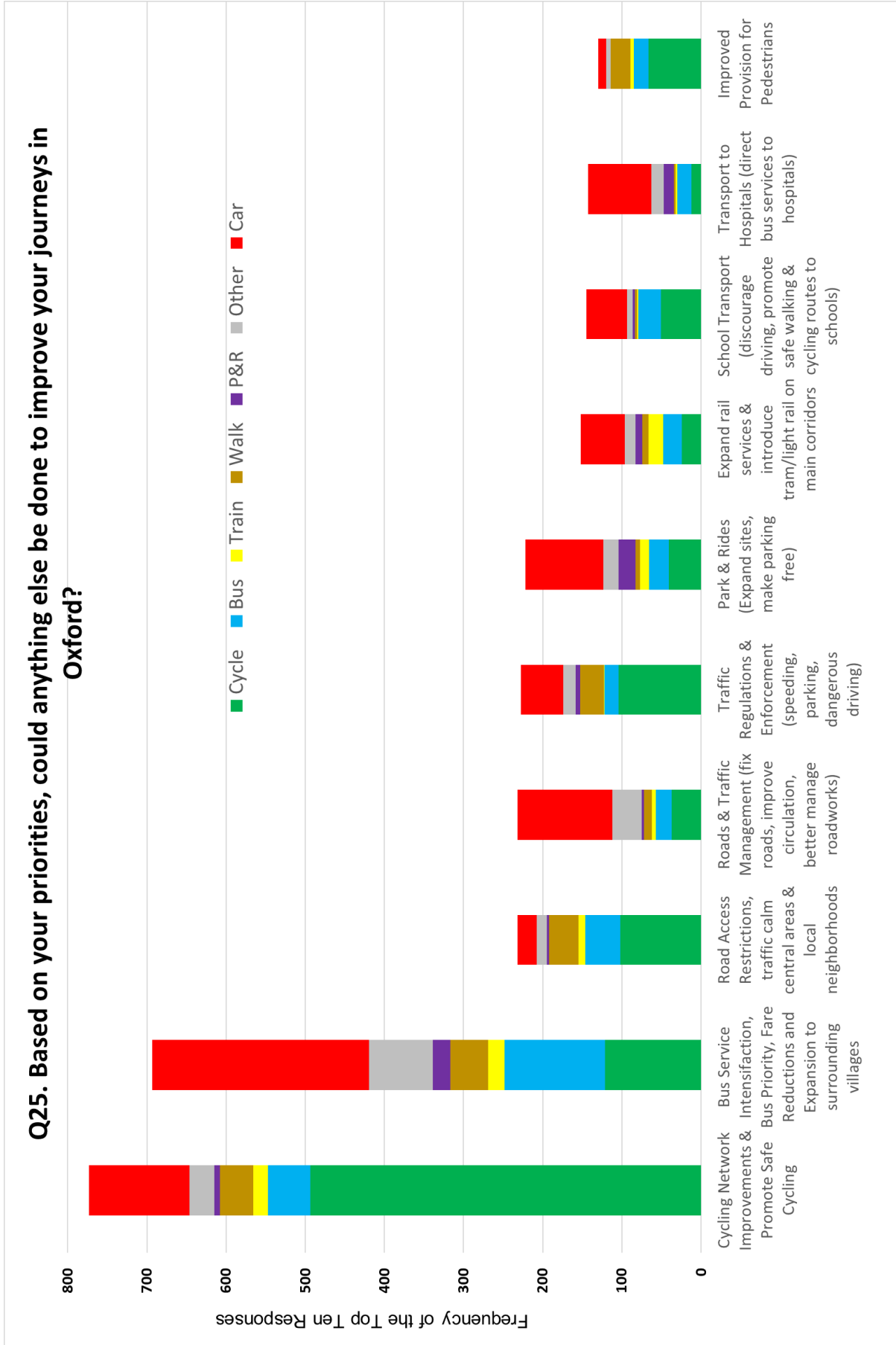
Ideas for Other Changes (Questions 25 – 29)

Question 25 – Could anything else be done to improve your journeys in Oxford

All of those responding in a personal capacity (2800) answered this question based on their priorities and most respondents indicated that something else could be done to improve their journey.

Many replies covered more than one aspect for suggested improvement. Figure 19 plots the 10 most frequently requested improvements. The chart shows how people's main mode of transport influenced the suggestions for improvements that were made.

Figure 19 – what else can be done to improve your journey in Oxford?
Q25. Based on your priorities, could anything else be done to improve your journeys in Oxford?





Two categories of replies made up 50% of all responses for suggested improvements, namely:

- Expand and enhance segregated and continuous cycling routes and promote safe cycling (26% of all suggestions) – mainly mentioned by those whose main mode of transport is cycle but also mentioned by those whose main mode is car, bus or walk.
- Comprehensive bus service improvements including new routes and expansions to serve surrounding villages, increasing priority for buses in traffic and a reduction in fares (24% of all suggestions) – mainly mentioned by those whose main mode of transport is car, but also by those whose main mode is bus, cycle or walk.

After the top two responses, there were four categories for suggested improvements all with a similar frequency of response namely:

- Further road access restrictions, traffic calm central areas and local neighbourhoods.
- Roads & traffic management (fix roads, improve circulation, better manage roadworks).
- More and better enforcement of Traffic regulations – e.g. speeding, parking, dangerous driving.
- Park & Rides - expand sites, make parking free, fares cheaper.

Online survey responses from those responding on behalf of an employer, business or other organisation (Questions 26 – 29)

132 responses were received online from people representing an organisation, on behalf of 119 identifiable organisations (some organisations submitted several responses, and in some cases, it was not possible to identify a specific organisation from the response).

These 119 organisations are listed below.

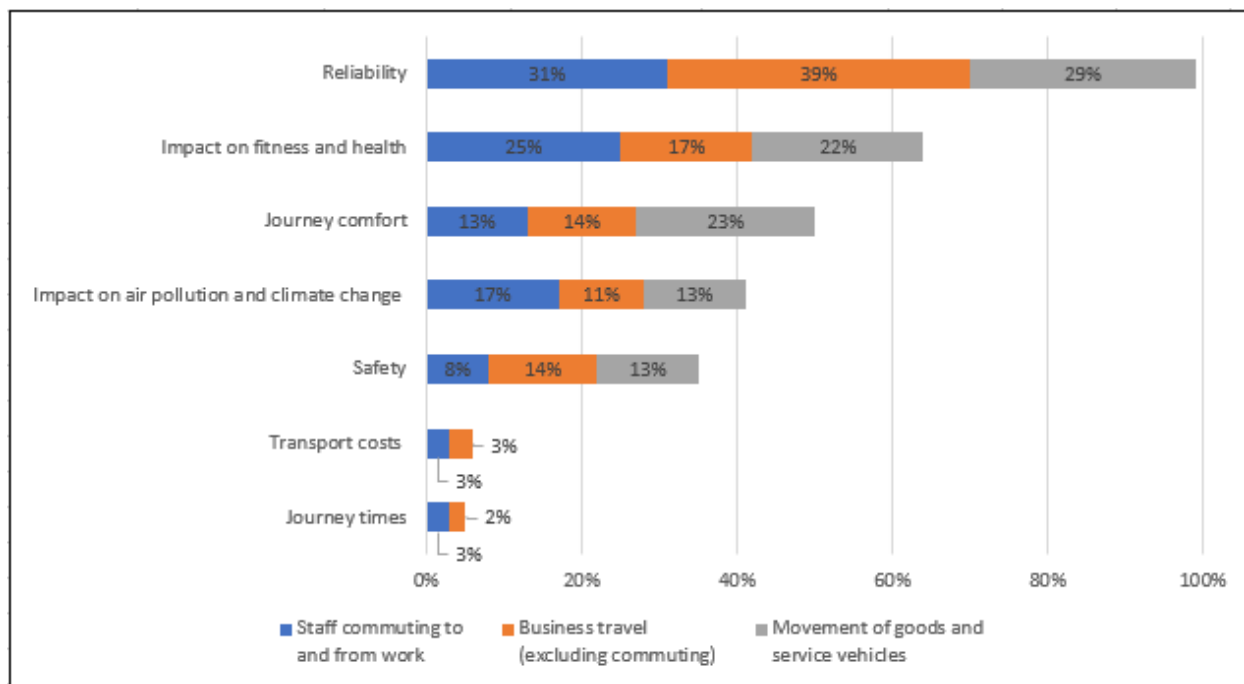
St Christopher's Primary School, Seeing Eye Productions Ltd, Adrian James Architects, Newtrim (UK) Limited, Pure Offices, Pamoja Education Ltd, Regus, The Dog House, Hollow Way Medical Centre, Headington Quarry School, Oxfordshire Transport & Access Group, Heather House B&B, Martin & Co, Oxford, MTDB Ltd t/a Common Ground, Colourful Coffins, Tyndale Community School, Oxford High School, Railfuture, Thames Valley Branch, St Anne's College, Indigo - shop on the Cowley Road, Cowley Parish Church of England, Summer Fields School, Oxbotica, Oxwash Limited, BMW (UK) Manufacturing Ltd, Basil Wyatt Holdings Ltd and Basil Wyatt Property Ltd, Kennington Parish Council, City Primary School, Risk Decisions Ltd, St Clare's Oxford, City of Oxford Licensed, Christ Church, Oxford Health NHS Foundation Trust, Employee of the John Radcliffe Hospital, Summertown Health Centre, Mobike, Zzoomm plc, St Christopher's Primary School, Cowley, Oxford Fertility, Arriva, Observatory Medical Practice, Visual Meaning Ltd, Bartlemas Surgery, L'altreVi Ltd, Zeta Specialist Lighting, River Hotel, CBT Oxford Ltd, Abingdon Town Council, BBOWT, Yogavenue, Gray Baynes and Shew LLP Architects and Surveyors, Linacre College, Oxford, Corpus Christi College, St Lukes Radiology Oxford Ltd, New College, Instruments of Time and Truth, Oxford Equity Group, Climate Organization, S Hutchins & Green Ltd, Freight Transport Association, Bright Properties, Oxford Harmonic Choir, Wolfson College, University of Oxford, Branca, Marston Ferry and Blackhall Allotment Society, St Michael's C of E Primary School, Oxford, OX3 0EJ, VSL and Parnters Ltd, North Hinksey Parish Council, New Marston Primary School, Mail Boxes Etc., R & G Building Services (Oxford) Ltd, Joe's Restaurant in Summertown, John Wiley & Sons Ltd, Urwin (Oxford) Ltd trading as Martin & Co, Oxford, Stovely Chimney Sweep and Stove Servicing, Oxford Bus Company and Thames Travel, St Edward's School, Driving instructors, BongolT, Babylon Trading, Frog Orange, Matthew Clulee hair spa, St Gregory the Great Catholic School, Isis Creative Framing, Jennifer Tanner Ltd, Beckley and Stowood Neighbourhood Plan Steering Group, New College School, Goring & Streatley Transport Office, Oxford University Hospitals NHS Foundation Trust, Keble College, Oxford West End Development Limited, Residents' Association for Elsfield Road and Oxford Road, Old Marston, Oxford Preservation Trust, The Swan School, Bodleian Packaging and Delivery Service, University of Oxford, Jeremy Jones Associates, Oxford Business Park, Rose Hill and Iffley Low Carbon, 19 Beaumont Street Surgery, Oxford, Bodleian Libraries, University of Oxford, J & M Insulations Limited,

South Jericho Residents' Association, Oxford Brookes University, Old Marston Parish Council, The Cherwell School, Oxfordshire Clinical Commissioning Group, Council of Oxfordshire Teacher Organisations, Oxford City Liberal Democrats, Sharp Laboratories of Europe Ltd., Harwell Campus Bicycle Users Group, Oxford Friends of the Earth, Oxfordshire Neighbourhoods & Villages Trust Ltd, Broken Spoke Bike Co-op, General Practitioners (practice not specified), CPRE Oxfordshire, Oxford Health NHS Trust, Bus Users Oxford, The Oxford Food Company Ltd, Cycling UK

Question 26 – what are your organisation’s top three priorities for transport in and around Oxford?

All respondents answering on behalf of a business or organisation answered the question requiring ranking of the three most important priorities for staff commuting to and from work, business travel (excluding commuting) and movement of goods and service vehicles. Some responses could not be used in the analysis because the question was incorrectly answered including selecting more than three priorities.

Figure 20: Top three most important journey priorities

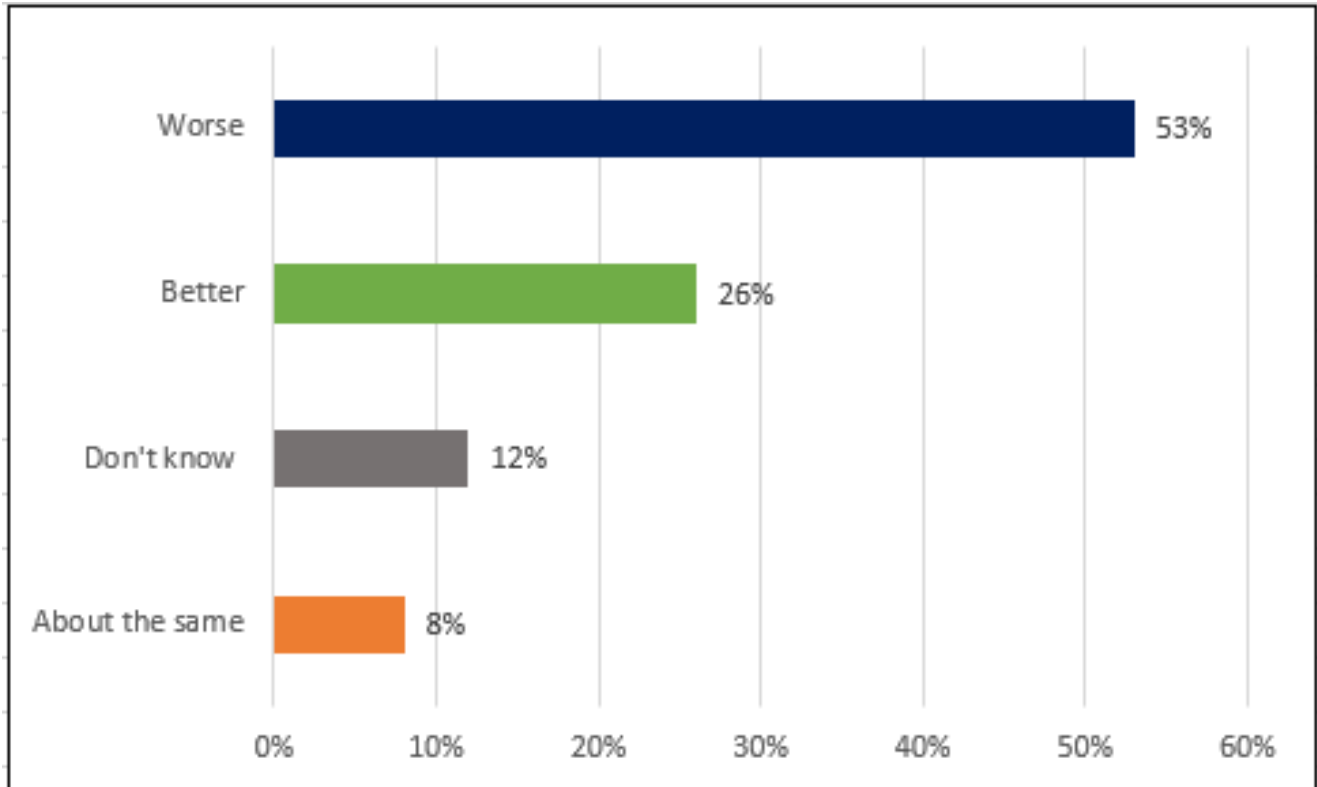


- Regardless of journey purpose, priorities are ranked similarly - ‘reliability’ is the most important priority followed by ‘impact on fitness and health’
- ‘Journey times’ and ‘transport costs’ are considered least important, with these priorities not selected under ‘movement of goods and service vehicles’

Question 27 – Does the organisation think traffic restrictions will make transport in Oxford better or worse overall?

All 132 respondents representing an organisation answered the question on would the proposed traffic restrictions make transport in Oxford better or worse overall.

Figure 21: Views on traffic restrictions of businesses, employers or organisations



- Over half of businesses, employers or organisations responding online indicated that the proposed traffic restrictions would make their journeys worse (53%).
- Just over one quarter of businesses, employers or organisations responding online indicated that the proposed traffic restrictions would make journeys better for their organisation (26%).
- 11% more respondents believed that the traffic restrictions would have a negative impact on their organisation compared to those responding to the survey in a personal capacity (see Figure 13).

Respondents commented on why they answered the way they did with a summary of the most common themes raised given below.

Traffic restrictions would make transport in and around Oxford 'better' overall

Comment theme, in descending order of number of mentions	Summary of feedback
Reduced traffic & congestion	<p>Respondents felt that traffic restrictions would be effective in reducing traffic and congestion levels in the city, with linked benefits for cycling, walking, pollution and public transport connectivity.</p> <p>Respondents also felt that the traffic restrictions would boost the number of people walking and cycling.</p>
Better cycling/walking	
Reduced pollution	
Better public transport	

Traffic restrictions would make transport in and around Oxford 'about the same' overall

Comment theme, in descending order of number of mentions	Summary of feedback
Congestion on alternative routes	Concerns that the traffic restrictions would simply transfer traffic to other routes in and around the city, causing congestion and pollution problems elsewhere, achieving no overall benefit
Travel habits hard to change	Concern that the measures proposed would be insufficient to change ingrained travel habits
Experience from London	Concern that London congestion charge has not achieved significant overall improvements

Traffic restrictions would make transport in Oxford 'worse' overall

Comment theme, in descending order of number of mentions	Summary of feedback



Congestion on alternative routes	Concerns that the traffic restrictions would simply transfer traffic to other routes in and around the city, causing congestion and pollution problems elsewhere, and making the overall situation worse.
Operational access	<p>Concerns that the traffic restrictions would cause difficulties for operational transport required for organisations to function, such as staff travel while at work, deliveries, servicing, visiting patients or clients.</p> <p>In many cases respondents felt these operational trips could not be easily made by other modes and could not be easily made using alternative routes. There were some exemptions suggested to allow for operational access requirements.</p>
Staff access/recruitment & retention concerns	Concern that the traffic restrictions would increase the time and cost for staff commuting to work, and that this would in turn make recruitment and retention of skilled staff more challenging.
Pollution	Linked to the first point above, concern that the traffic restrictions would i) displace traffic to other areas and increase pollution in those areas; and ii) increase emissions and pollution overall due to longer distances travelled by diverted traffic.
Lack of public transport alternatives	Concern that suitable public transport options are not available for staff, patients, visitors or customers who would be affected by the traffic restrictions.

'Don't know' if traffic restrictions would make transport in and around Oxford better or worse overall

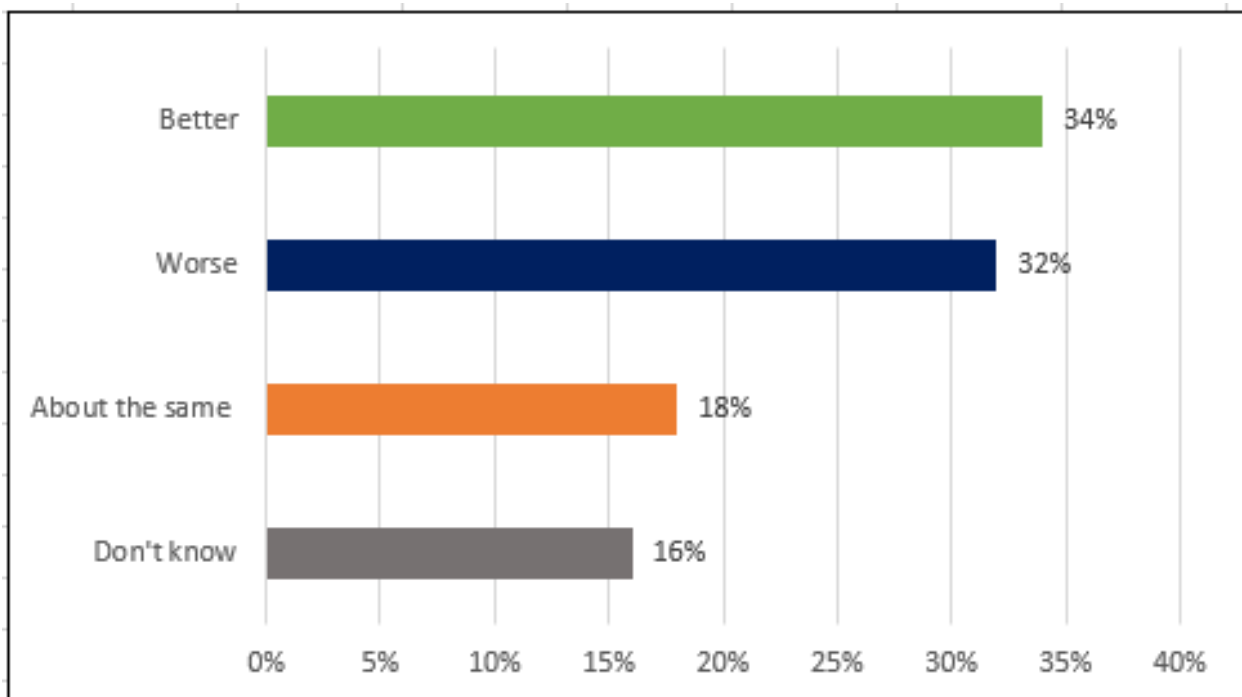
Comment theme, in descending order of number of mentions	Summary of feedback
Mixed views	These respondents saw both advantages and disadvantages, so felt they were unable to assess the overall impact

Need more evidence	These respondents felt they needed more information before they could assess the overall impact.
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Question 28 – Does the organisation think the workplace parking levy and the improvements it will pay for will make transport in Oxford better or worse overall?

All 132 respondents representing an organisation answered this question.

Figure 22: Views on workplace parking levy of businesses, employers or organisations



- About a third of businesses, employers or organisations responding online indicated that a workplace parking levy and the improvements it would pay for would make transport in and around Oxford 'better' (34%). A similar proportion also indicated that it would make transport 'worse' (32%).
- Nearly 1 in 5 indicated that transport would be 'about the same' (18%).

From their organisation's perspective, respondents were subsequently asked why they thought transport in and around Oxford would be 'better', 'about the same', 'worse' or 'don't know' as a result of the proposed workplace parking levy. A summary of the most common themes raised is given below.

The workplace parking levy would make transport in and around Oxford 'better' overall

Comment theme, in descending order of number of mentions	Summary of feedback
Better public transport	Respondents felt funds from the WPL would allow public transport to be improved, and would encourage commuters to use public transport
Reduced traffic	Respondents thought the WPL would reduce traffic in the city
Better cycling/walking	Respondents felt the WPL could fund cycling and walking improvements and that it would encourage commuters to use non-car modes.

The workplace parking levy would make transport in and around Oxford 'worse' overall

Comment theme, in descending order of number of mentions	Summary of feedback
Impact on local economy	View that the WPL is simply an additional tax on employers. Some who viewed the WPL in this way did not believe that transport improvements would be delivered, and/or felt that the improvements identified were insufficient to provide an overall transport benefit.
Staff access/recruitment & retention concerns	View that the WPL will make working in the area less attractive for staff and so cause employers to relocate away from Oxford, with consequences for the city's economy, with no overall transport benefit.
Lack of alternatives	Concern that alternatives to the car are insufficient, so scheme will not achieve a mode shift and will therefore provide no overall transport benefit.

The workplace parking levy would make transport in and around Oxford 'about the same' overall



Comment theme, in descending order of number of mentions	Summary of feedback
Staff access/recruitment & retention concerns	Concerns that the WPL would have to be passed on to staff (because the organisation could not afford to pay it) and that this would make it harder to recruit and retain skilled staff.
Impact on local economy	View that the WPL is simply an additional tax on employers. Some who viewed the WPL in this way did not believe that transport improvements would be delivered, and/or felt that the improvements identified were insufficient.
Cost	Concern that the WPL would impose additional costs on employers.
Employers will relocate away from Oxford	View that the WPL will cause employers to relocate away from Oxford, with consequences for the city's economy.

Respondents didn't know what impact the workplace parking levy would have on transport in and around Oxford overall

Comment theme, in descending order of number of mentions	Summary of feedback
No impact on organisation	Respondents felt their organisation would not be affected by the WPL so did not wish to comment on the overall impact.
Need more evidence	These respondents felt they needed more information before they could assess the overall impact.

Responses to more detailed questions (Q30-39)

The responses to the more detailed questions include comments from those responding in a personal capacity as well as those responding on behalf of a business, employer or other organisation. Two thirds of all respondents continued with the survey to answer the more detailed questions. A summary analysis for these questions is set out in the sections below.

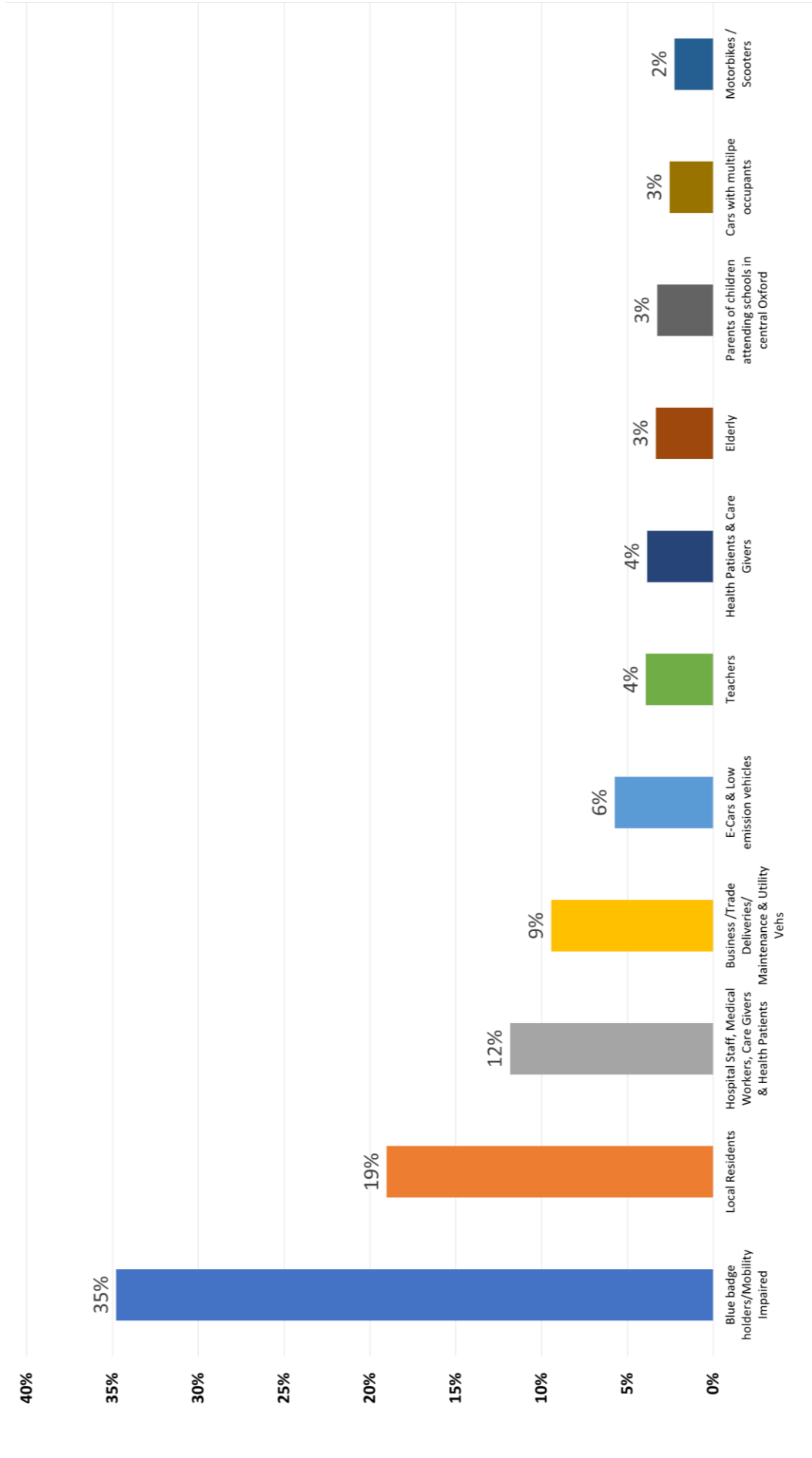
Q31. Should there be any exemptions for the traffic restrictions?

1699 people (58% of all responses) provided feedback on this question.

Figure 23 plots responses by most common types of suggested exemptions. The exemption to the proposed traffic restrictions most frequently requested were vehicle trips undertaken by mobility impaired / disabled persons. This was followed by exemptions for residents and then travel for hospital staff, medical workers, care givers & health patients. It was suggested that these are essential and urgent trips not possible by public transport.

60 responses stated that taxis and private hire vehicles should not be exempt from traffic restrictions due to concern about the excessive number of such vehicles plying for hire in the central city area.

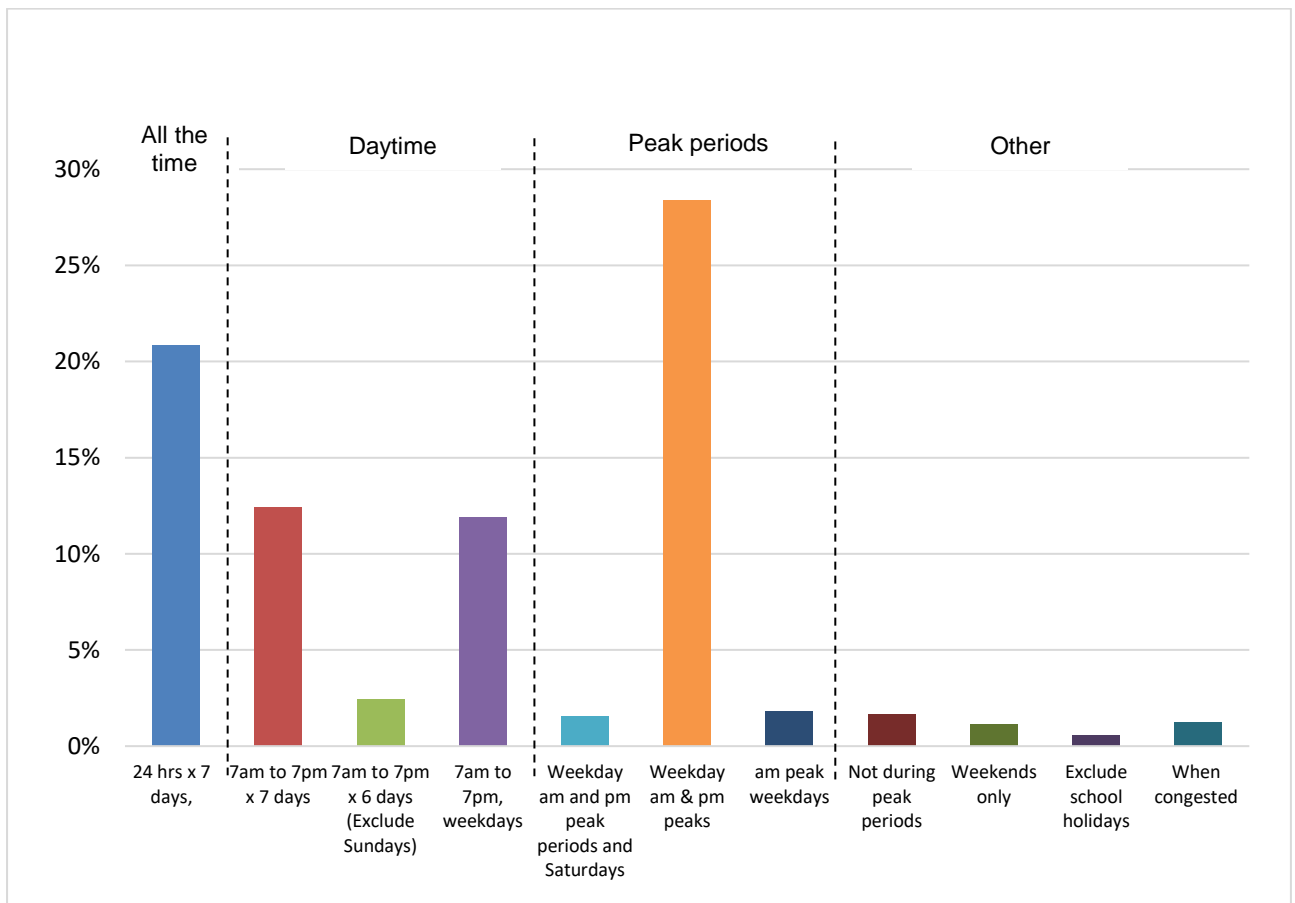
Figure 23 – suggestions for exemptions for traffic restrictions



Q32. At what times and on which days should the traffic restrictions be in force?

1630 people (56% of all responses) answered this additional question. Figure 24 shows the categorised responses. The highest number of responses (28%) stated that restrictions should be in place on Monday to Friday during peak periods only, when the traffic levels are at their highest. The second highest number of responses (21%) called for restrictions to be in place 24hrs and 7 days a week, supported by comments calling for bold action to foster significant behaviour change, and to be consistent and avoid confusion.

Figure 24 – when should the traffic restrictions be operational?



There were also many comments regarding heavy traffic accessing the Westgate Centre on Saturdays and that this should be better managed through restrictions. A high number of comments reflected on the need for intensive engagement with commerce and utility providers to ensure that deliveries and essential services can be appropriately scheduled to avoid severe impacts on business.

**Q33. What other complementary schemes would you like to see for the traffic restrictions?**

1319 people (45% of all respondents) answered this additional question. Figure 25 shows the categorised responses. The highest number of responses were in support of promoting sustainable transport with the top three measures in this category to complement traffic restrictions being:

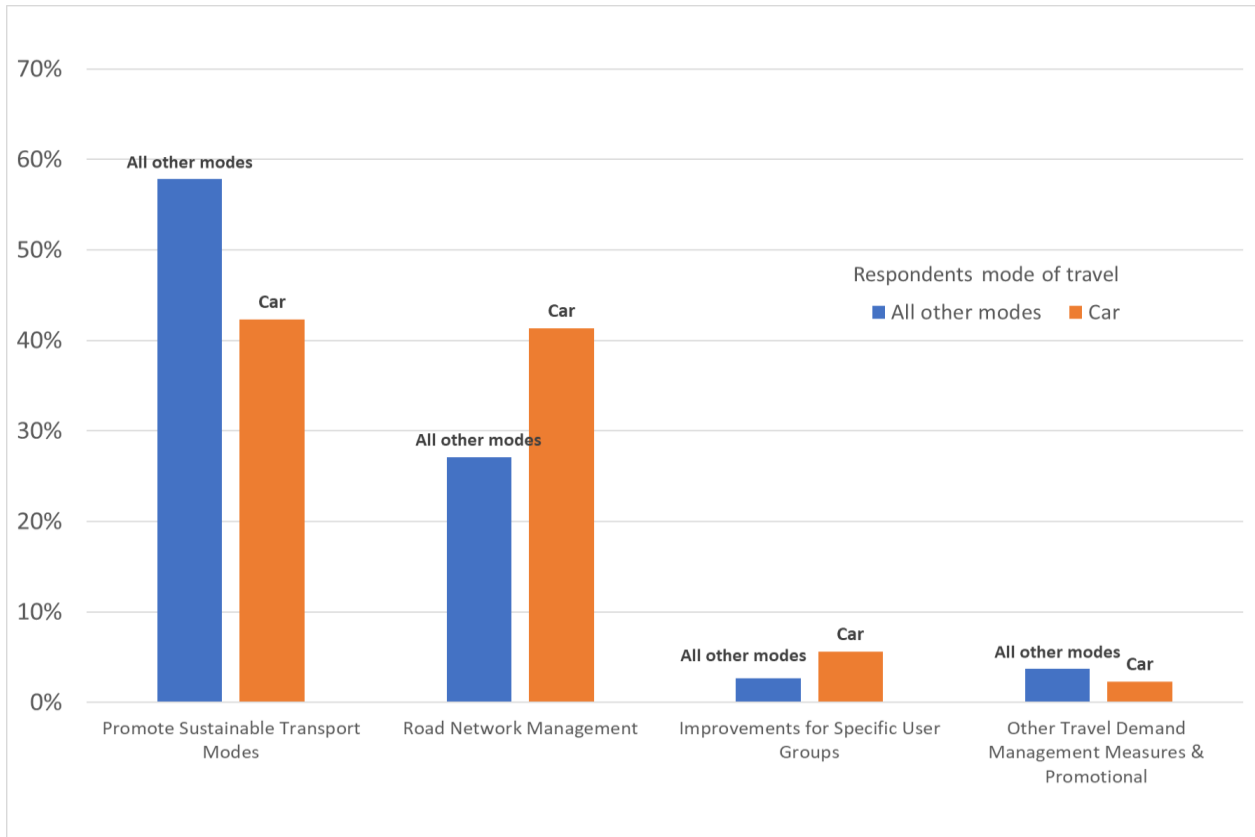
- Roll out of priority/segregated cycling and pedestrian network & active travel promotion
- Lower pricing of (or free) Park & Ride services
- Expand and intensify bus services and the route network, especially to Hospitals and Business Parks

This response was similar across respondents' main mode of travel. One notable difference being that car users most frequently requested measure was for free and expanded access to Park & Ride locations.

Road network management measures were the second most popular main category of suggested enhancements with the key measures referenced:

- Congestion charging
- Traffic management improvements (e.g. one-way streets, signals timings, mini-roundabouts)
- Low traffic neighbourhood schemes / mini Holland's / urban realm improvements / planting
- Better enforcement (e.g. of parking violations, dangerous driving, obeying traffic rules)

Figure 25. Main Categories of Responses for Question 33 Split by Respondents Main Mode of Travel



Other notable responses were comments calling for a greater focus on safer/lower speed roads around schools and promoting active travel for school children/students.

Another frequent comment was the wish to see tourist and special hire buses and coaches parking outside the central area and not adding to congestion and pollution inside in the city centre.

Figures 26 to 29 detail specific complementary measures that were mentioned by respondents grouped by each of the four main categories identified in Figure 25:

- Promote sustainable transport modes (Figure 26)
- Road network management (Figure 27)
- Improvements for specific user groups (Figure 28)
- Other travel demand management measures and promotional activity (Figure 29)

Figure 26. Q33 - Specific Measures to complement traffic restrictions – Promote Sustainable Modes

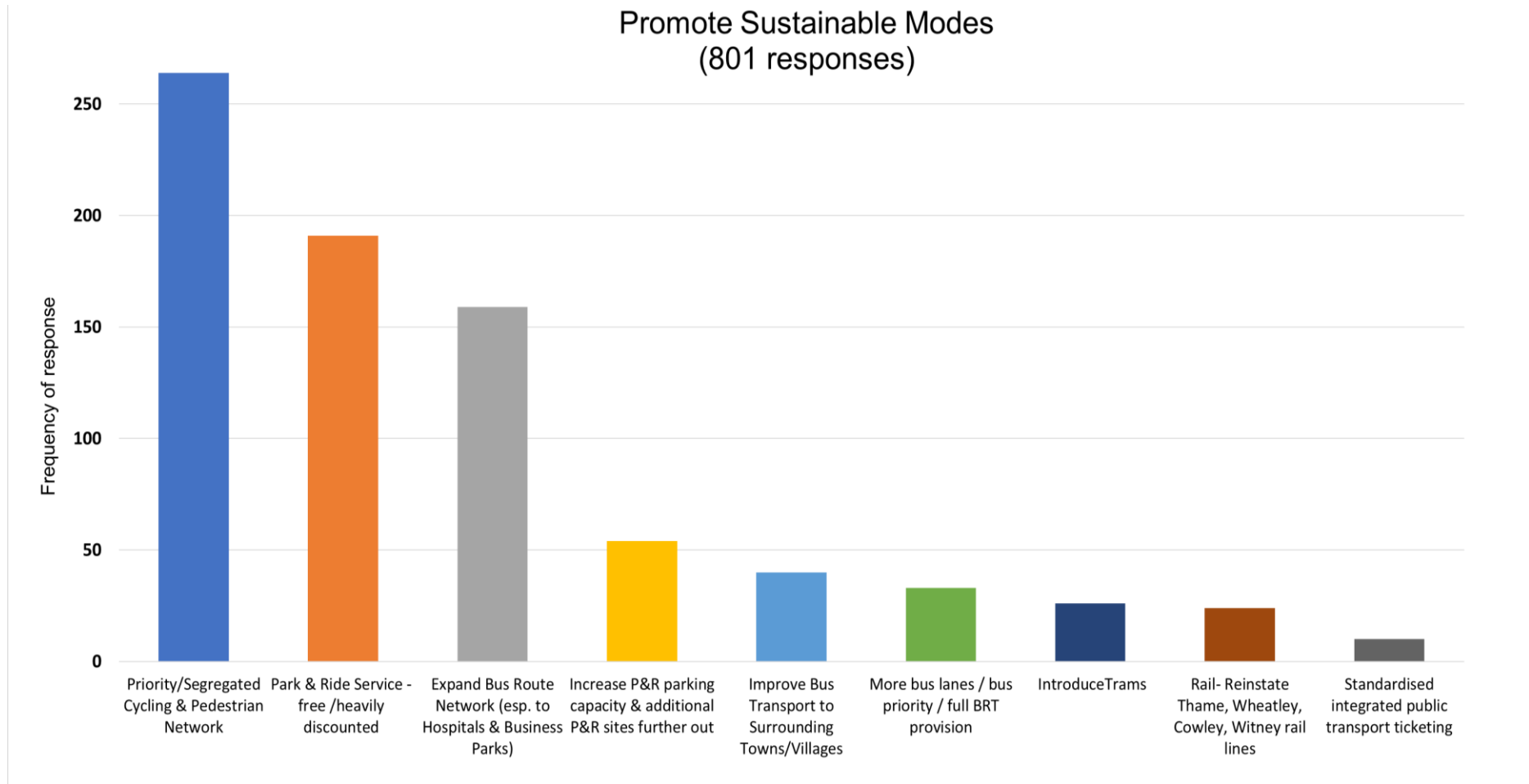


Figure 27. Q33 - Specific Measures to complement traffic restrictions – Improvements to Road Network Management

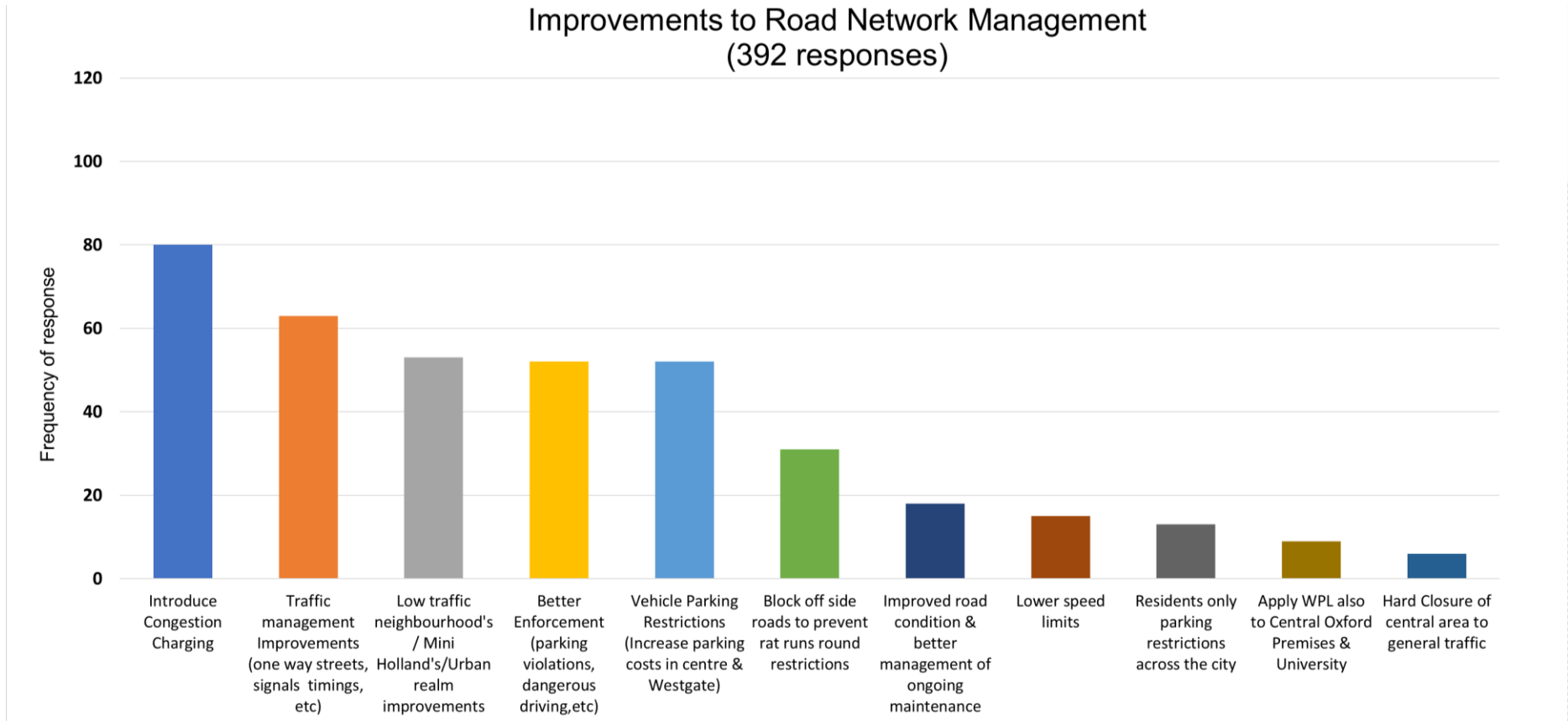


Figure 28. Q33 - Specific Measures to complement traffic restrictions – Improvements for specific user groups

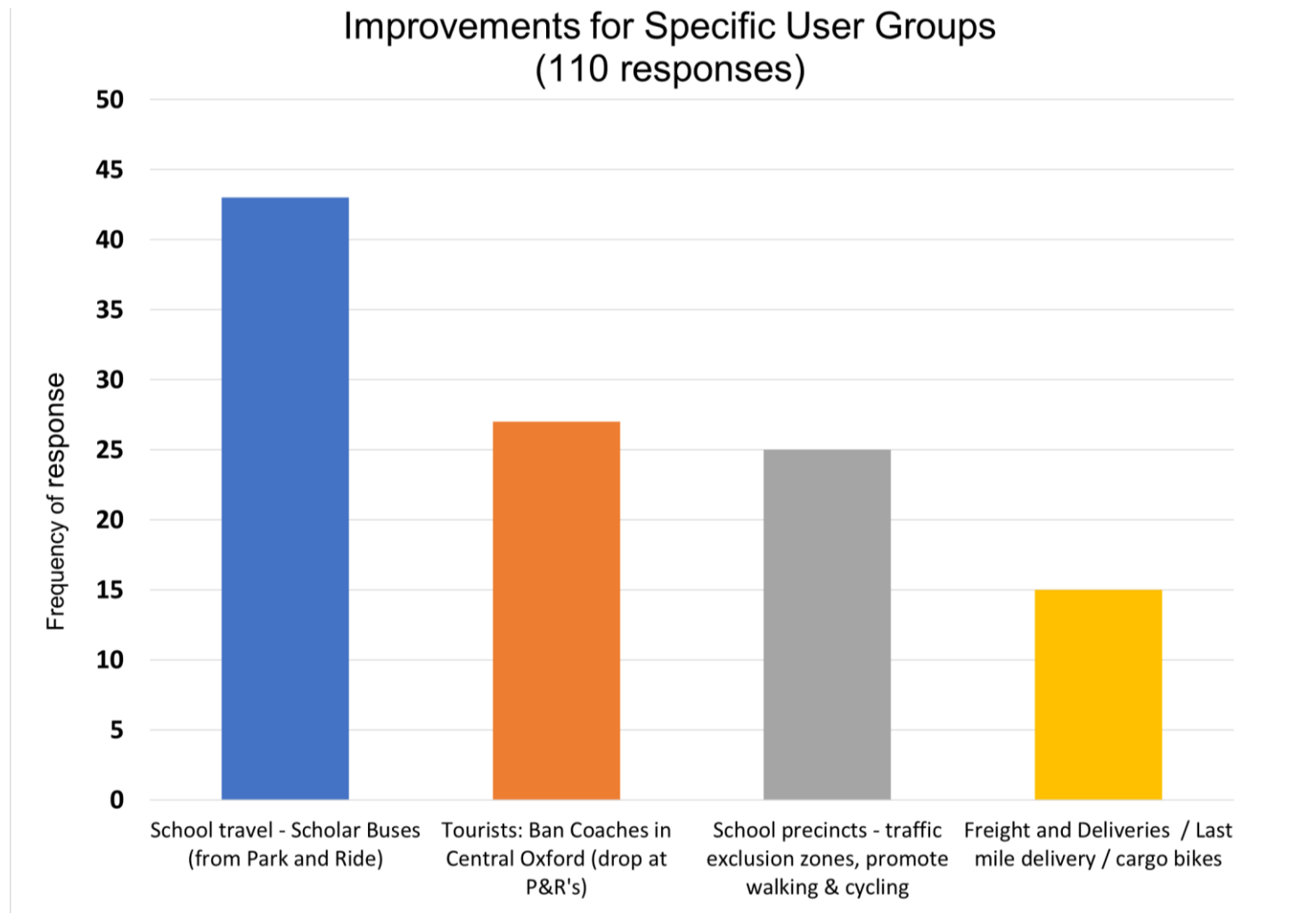
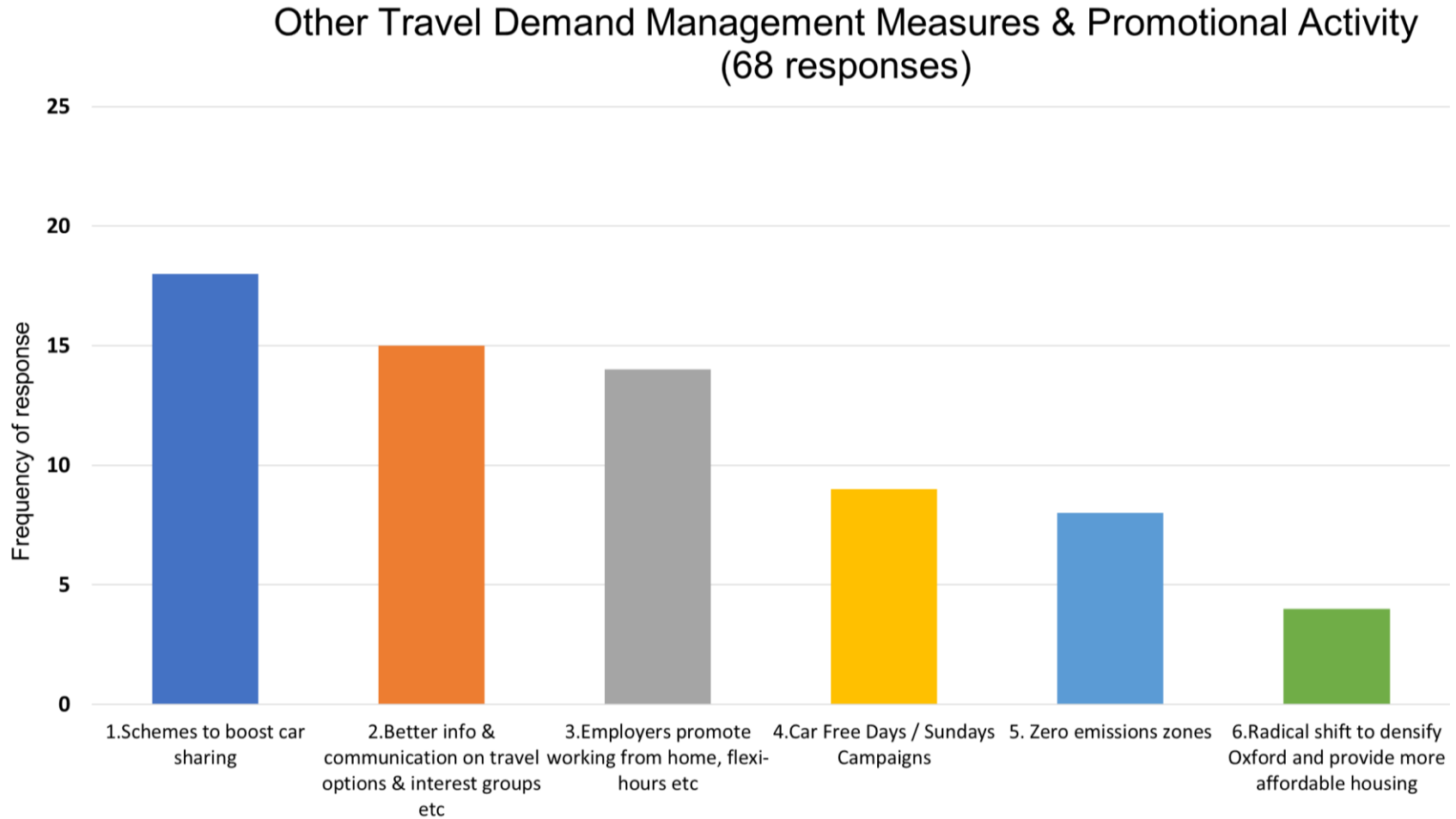


Figure 29. Q33 - Specific Measures to complement traffic restrictions – Other Travel Demand Management Measures & Promotional Activity

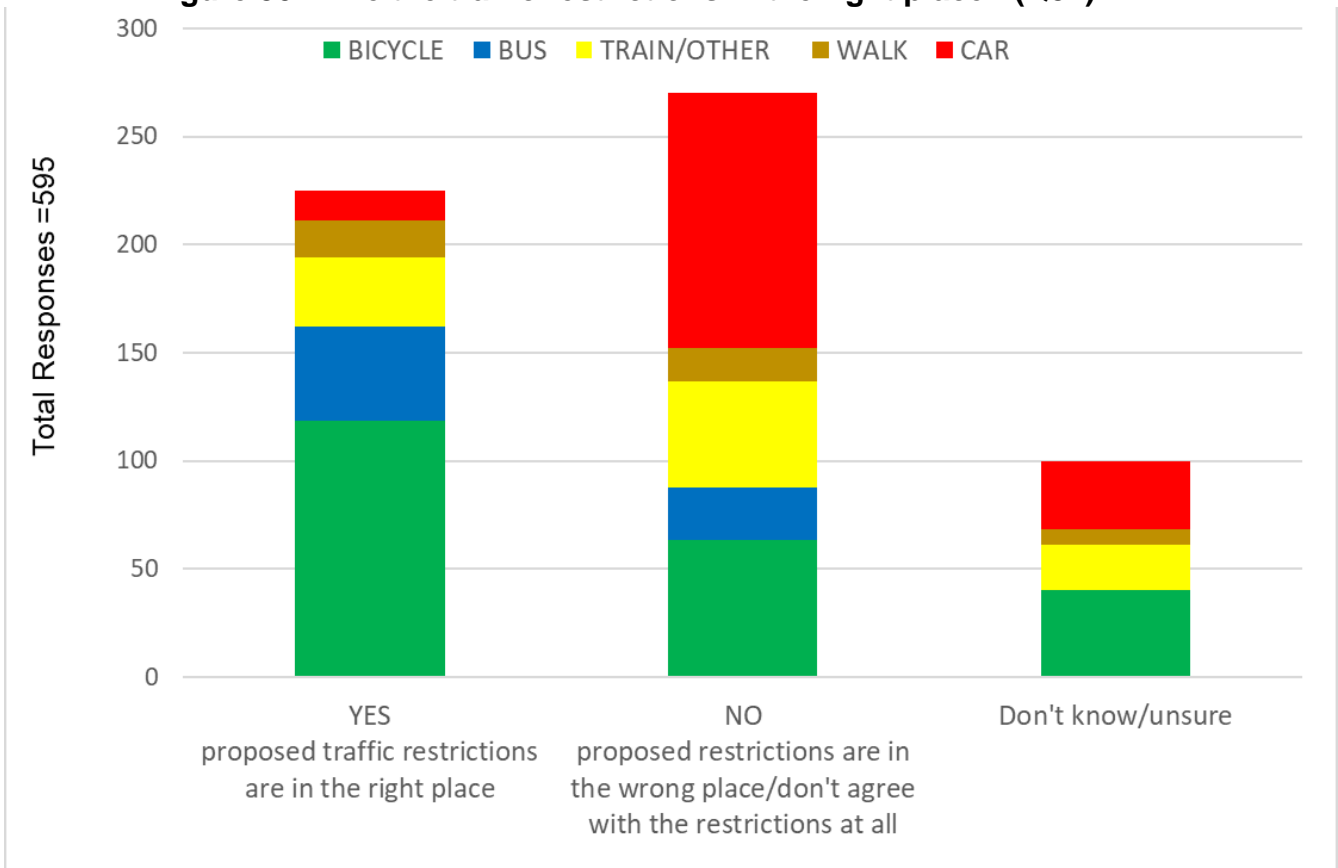


Q34. Are the suggested traffic restrictions in the right places?

The responses to the first part of the question “*Are the suggested traffic restrictions in the right places?*” is shown in Figure 30 below. The 595 responses recorded were evenly split between those whose main mode of travel is car, bike and those using public transport.

In total, for all modes taken together, there are more responses that voice disagreement with the proposed placement of traffic restrictions than responses in general agreement with the proposed locations. There is a contrast when comparing between respondents in terms of their main mode of travel. Of the responses made from those travelling by car there are many more disagreeing with the locations of restrictions and/or being against the restrictions generally as compared to car users in agreement. In contrast, responses for those travelling by bicycle, there were twice the number in agreement with the locations to those having some disagreement.

Figure 30 – Are the traffic restrictions in the right place? (Q34)



Of the 353 recorded responses proposing additional roads to be included in the traffic restrictions (see Figure 31), 63% came from people who cycle as their main mode of travel.

Figure 31 – suggestions for additional traffic restrictions (Q34)

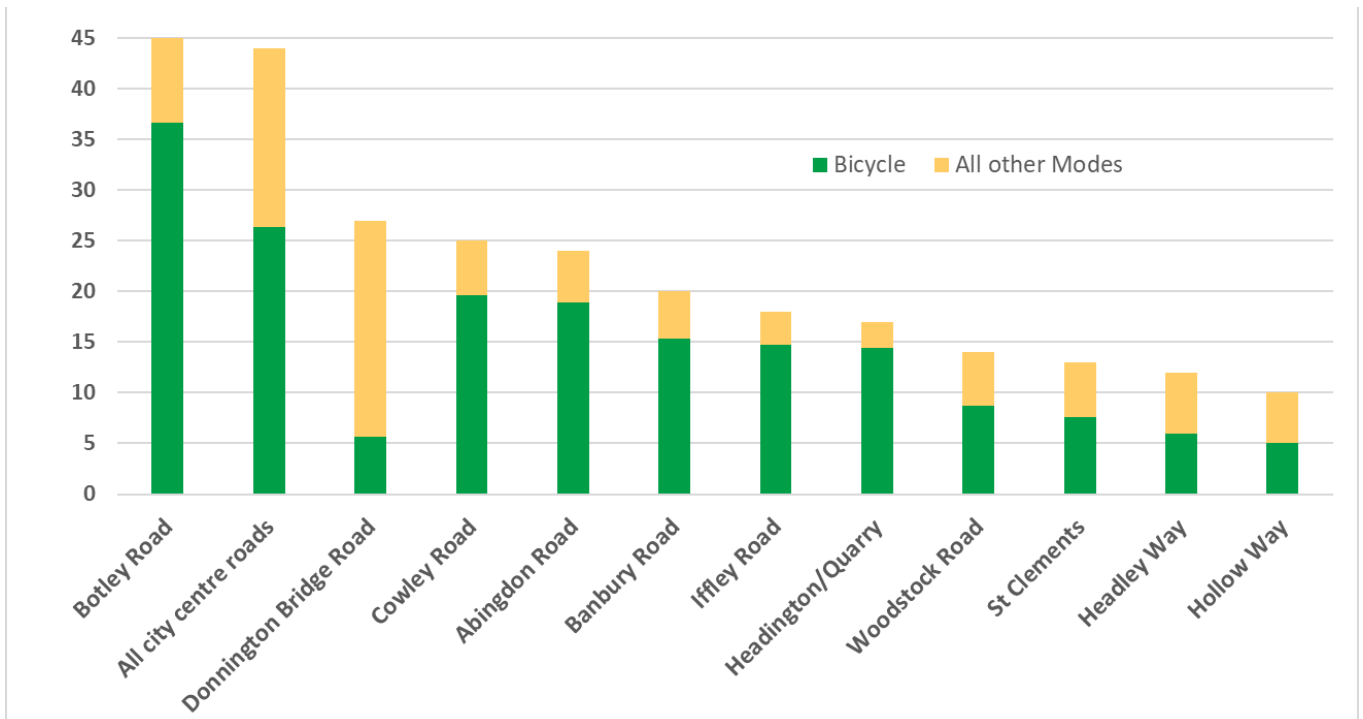
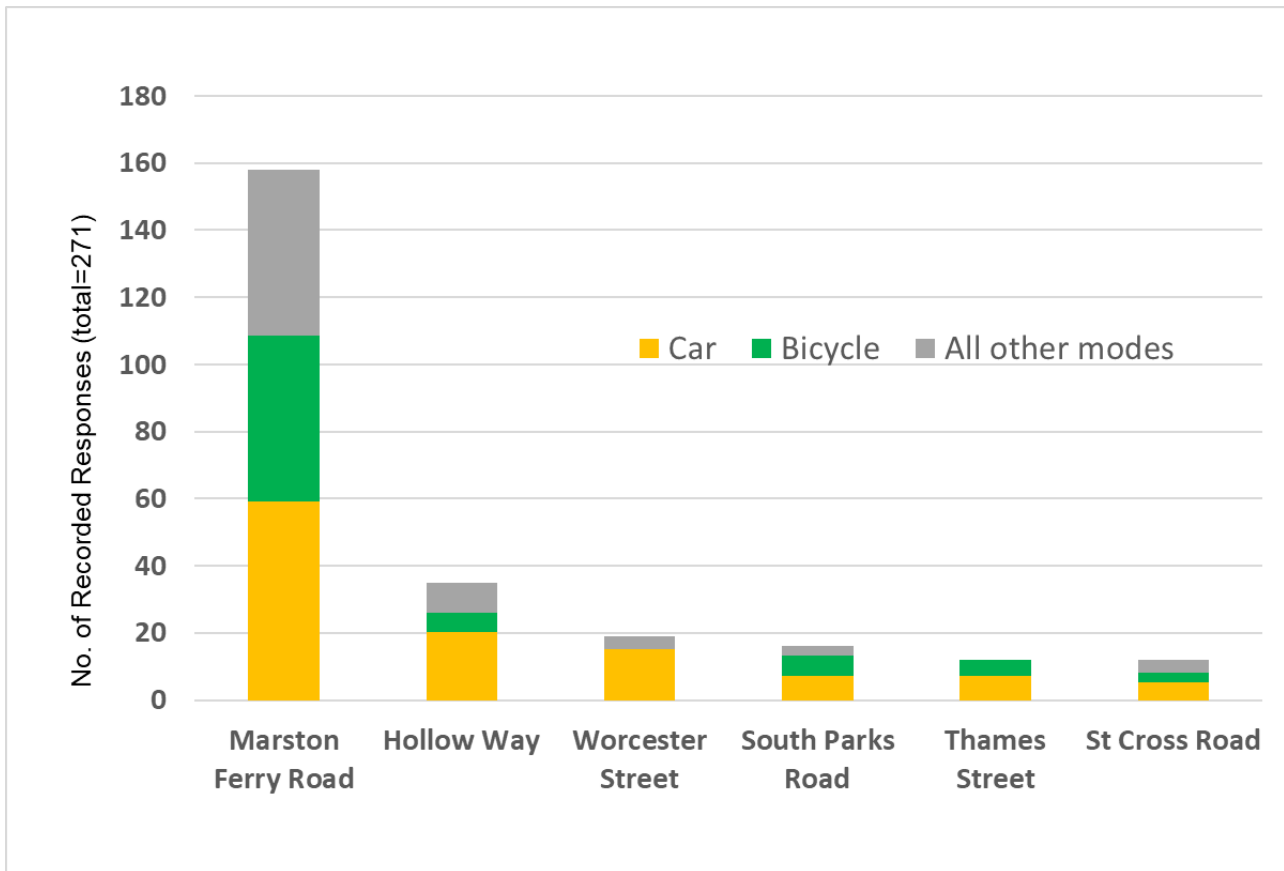


Figure 32 shows respondents' suggestions regarding roads to be excluded from restrictions. The most requested change was for Marston Ferry Road, a view shared by car users, public transport users and cyclists. The general opinion being that traffic would be displaced outwards onto an already congested ring road and result in a worse situation overall. The comment was frequently made that planned increases in bus services will not in the short to medium term be sufficient to create the balance. There were also numerous comments, mainly from car-as-main-mode respondents requesting Hollow Way to be excluded as it would prevent local resident access.

Figure 32 – Suggestions for roads not to be included in the traffic restrictions



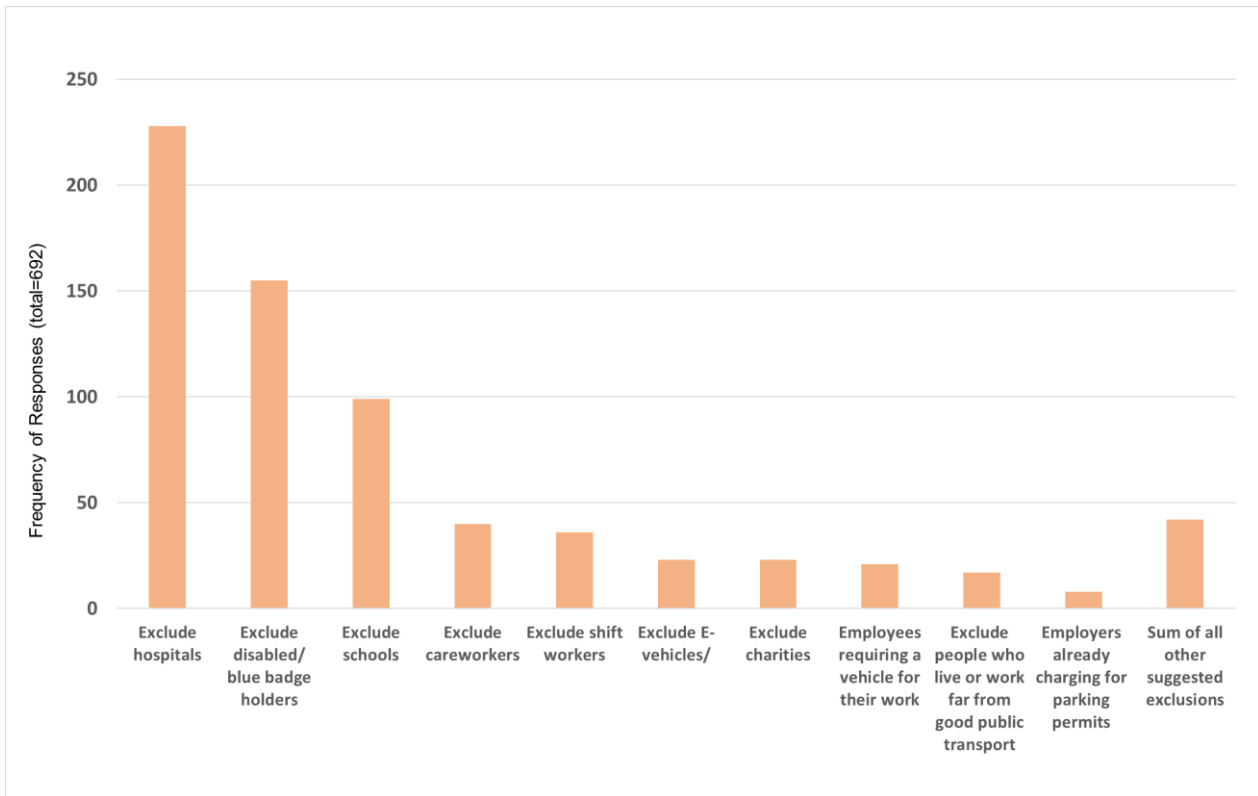
Q35. Should employers who provide 10 or fewer commuter car parking spaces be exempt from the workplace parking levy? Should there be other exemptions?

There was a total of 873 recorded responses to the question of whether the proposal for employers who provide 10 or fewer commuter car parking spaces to be exempt was right:

- 315 (36%) indicated there should no exemptions, suggesting that even employers who provide 10 or fewer spaces should be in scope
- 87 (10%) stated there should only be exemptions for employers providing 5 or fewer employee parking spaces
- 269 (31%) of responses agreed that the proposal of 10 or less spaces being exempt was appropriate.

There was a total of 692 responses to the question of whether anyone else should be exempt from the workplace parking levy. The most frequent responses in order were a) hospital staff b) blue badge holders/ disabled persons and c) school staff (teachers). See figure 33 below.

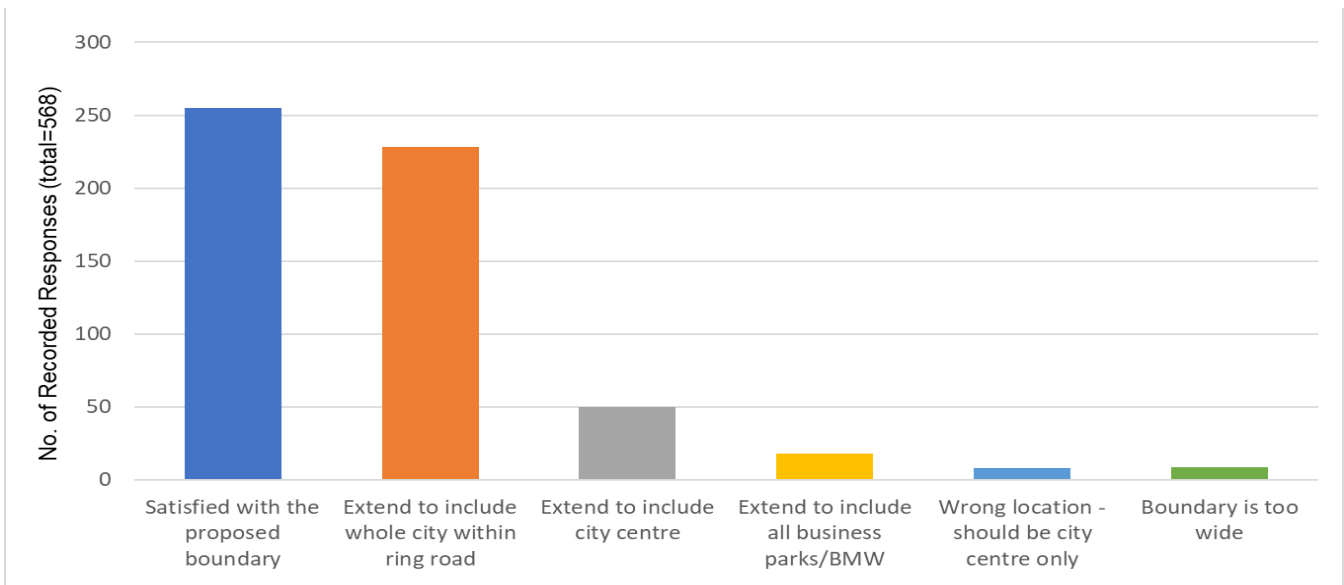
Figure 33 - Q35 - Should Anyone Else be Exempt from the WPL



Q36 - views on the proposed boundary of the Eastern Arc workplace parking levy.

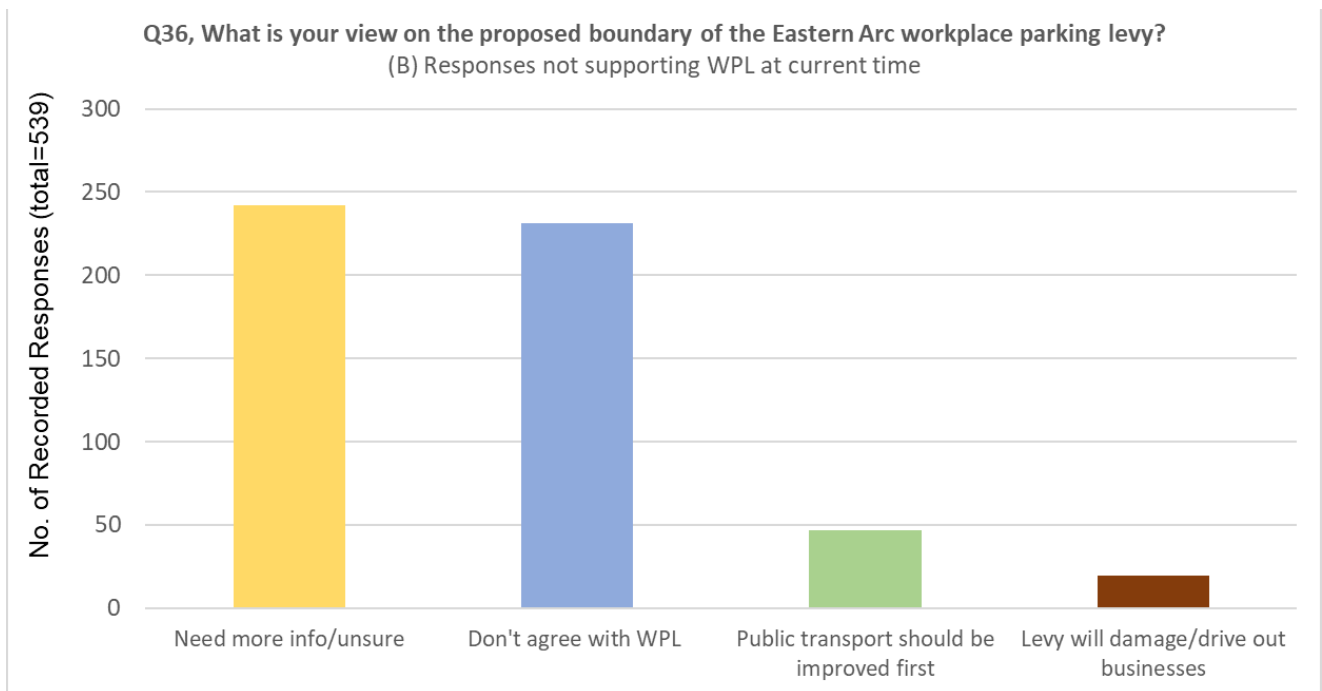
Responses to this question were categorised into two groups a) those commenting on the location of the proposed boundary and b) all other comments. The results are presented in figures 34 and 35 below.

Figure 34 – what is your view on the proposed WPL area boundary? (Q36)



568 comments were recorded on the boundary position, see figure 34 above, with a slight majority satisfied with the proposed boundary. A large proportion also indicated that that the boundary should be extended further within the ring road.

Figure 35 – responses to Q36 of those not currently supporting WPL



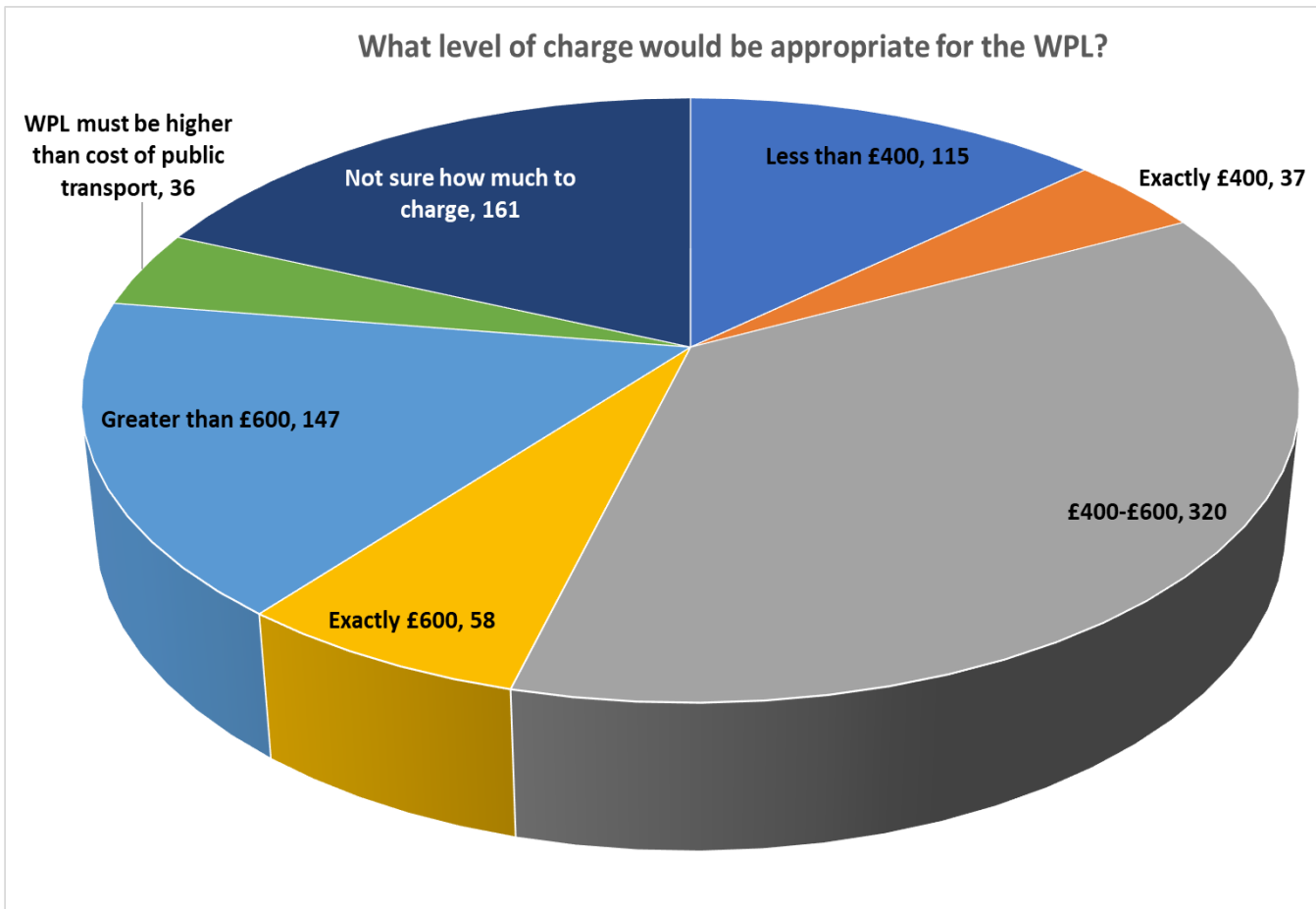
Of the other responses, i.e. those which did not relate to the location of the boundary, (539 responses) these were mostly a balance of respondents needing more information to be able to comment and those not agreeing with the WPL introduction. In addition, a significant number of respondents commented that public transport should be improved significantly before a WPL is introduced.



Q37. Views on the level of charge for the workplace parking levy? £400 - 600 per parking space per year is the suggested level.

1354 respondents (46%) provided a comment on this question. Of the responses, 783 were categorised as they directly responded to the question, and as shown in Figure 36, 320 of these agreed with a WPL set somewhere between £400 and £600, 115 suggested £400 or less while 205 suggested a level of £600 or above.

Of the 1354 responses, 25% indicated that they were not in support of a workplace parking levy and a further 13% were not sure what level to suggest.

Figure 36 - Responses to Q37

Q38. Views on the suggested bus routes and employer/employee benefits that could be funded through the workplace parking levy, and whether the levy should be used to fund any other transport improvements.

There was an overall 47% response rate to Q38, totalling 1384 respondents. The question posed was tiered asking a) for views on the proposed use of WPL funds and b) if the respondent had suggestions for funding other transport improvements.

Only a small percentage of respondents specifically commented on the suggested bus routes and employer/employee benefits. Of those that did, 70% expressed general agreement on the proposals.

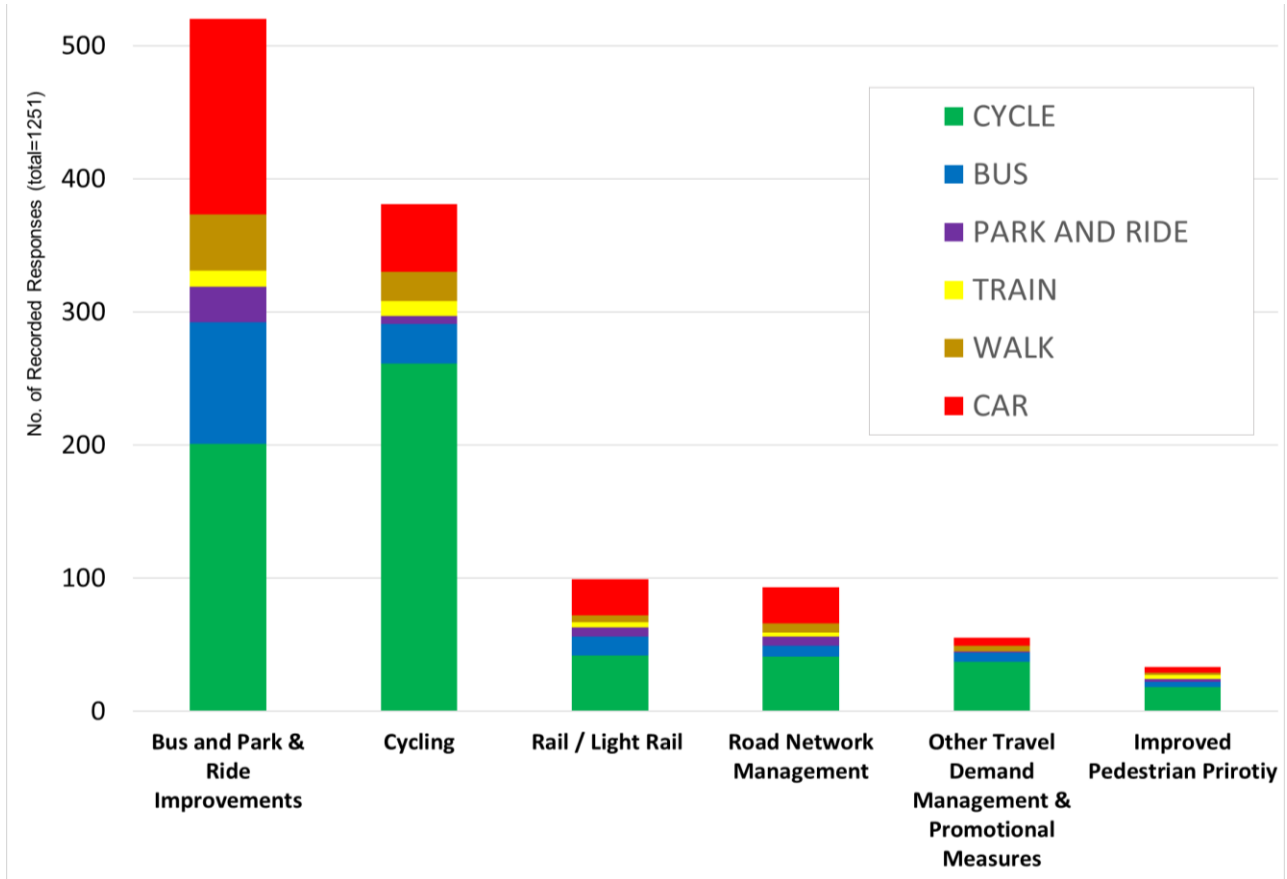
1521 other suggestions were made for how the levy could be used. The top three suggestions were:

- Develop priority/segreated cycling network and comprehensive cycling promotion
- Expansion and intensification of bus service network (including non-radial routes and to hospitals and business parks)
- Free or strongly subsidised bus and Park & Ride services

These most recorded responses mirror the analysis of Question 33 (What other complementary schemes would you like to see for the traffic restrictions).

The following chart illustrates these responses grouped according to the main mode of travel of the respondent.

Figure 37 - Responses to Q38 grouped according to main mode of travel of respondent



Q39. If you'd like to make any other comments before you finish, please do so here

1235 respondents provided further comments. A further 32 individuals submitted comments by email or letter. These range of responses have been plotted in Figure 38. These follow a similar pattern of feedback throughout the open questions in the online survey. The interventions most requested are listed as follows:

- The need to focus more on the expansion of the cycling network to prioritise road space to promote safe, well connected routes
- Expansion and intensification of the bus network to serve more trip needs, especially poorly served and isolated surrounding settlements.

Fig 38. Representation of responses to Q39, Any Other Comments?



Stakeholder/organisation letter and email comments

The following 45 stakeholder groups and organisations submitted responses by email or letter in addition to or instead of completing the questionnaire.

Arlington, Bicester Town Council, Brasenose College, Bullingdon Community Association, Centre for Research into Energy Demand Solutions, Chilton Parish Council, CoHSAT (Coalition for Healthy Streets and Active Travel), Cowley Area Transport Group, Cyclox, East Hendred Parish Council, Freeland Parish Council, Freight Transport Association, Friends of Old Headington, Headington Action, Holiday Inn Express Hotel, Hollow Way Medical Centre, Iffley Vets, Magdalen College School, Oxford Biomedica, Oxford Bus Company, Oxford City and County Bowls Club, Oxford City Cycling UK, Oxford City Economic Growth Board, Oxford Civic Society, Oxford Pedestrians Association, Oxford Schools Bus Partnership, Oxfordshire County Council Liberal Democrats Group, Oxfordshire Cycling Network, Oxfordshire Green party, Oxfordshire National Pensioners Convention Group, Oxford University Conference of Colleges, Oxford University Hospitals NHS Trust, POETS (Planning Oxfordshire's Environment and Transport Sustainably), Rewley Park Management Company, ROX (Rescue Oxford), St John Street Area Residents' Association, St Margaret's Road Summertown Neighbourhood Forum, South Oxfordshire District Council, SPADE (Sunningwell Parishioners Against Damage to the Environment), Stagecoach in Oxfordshire, Thomas White Oxford, University of Oxford, Vale of White Horse District Council, Watlington Parish Council, Wolfson College

The following is a brief summary of the most common raised issues in the non-questionnaire stakeholder responses.

General support for the proposals

Whilst some concerns were expressed, the majority of the organisations that submitted non questionnaire responses expressed general support for the objectives of Connecting Oxford albeit many of these did so in the context of needing further detail of how the proposals had been arrived at and what impact they would have.

More information

Most respondents want to see more information on the practical implications of the proposals, in terms of how effective they would be in reducing traffic and improving conditions for non-car alternatives. One of the most common themes in relation to the need for more information was how much traffic displacement there would be (mainly as a result of the traffic restriction points) on alternative routes, especially Oxford's radial routes and ring road. There was concern that the proposals could simply move congestion problems around, possibly even exacerbating existing problems.

There were also queries regarding how much revenue the WPL proposals would raise and whether it would be enough to pay for the bus services and non-car infrastructure needed to create travel behaviour change.



There was strong support for the councils to undertake traffic modelling to help better understand how the proposals would influence travel across the city. This would therefore help to refine the details of the proposals. Suggestions were made by some about how the modelling should be carried out.

Stakeholder input to development of the proposals

Some organisations said they would like to be involved in shaping the proposals as they develop. This includes those that have large numbers of staff and hold lots of detailed information about how they currently travel to and around the city.

WPL coverage

It was suggested by many resident, transport and planning groups, and employers that the WPL should apply across the whole city. Covering only the proposed area of the Eastern Arc is considered by some to be inequitable and not sufficiently effective in reducing traffic volumes and influencing behavioural change. It was also frequently suggested that every parking space used for commuting should be covered by the WPL and not just those where workplaces had 11 or more. Concern was expressed about concentrations of employment that generate large volumes of traffic and congestion but which are not in scope of the WPL.

Unfair WPL and impact on businesses

A number of businesses felt that the WPL would be an unfair charge for local businesses who already contribute to the local economy by way of business rates. Queries were raised about why certain areas of the city including beyond the ring road would not be in scope for the WPL.

Businesses and schools were concerned that the introduction of a WPL would have an unhelpful negative impact on staff recruitment and retention – it is already difficult to attract staff to jobs in the city.

Why not a congestion charge?

There was a call for more information/explanation as to why the use of a congestion charge was not being proposed. A number of respondents felt that a congestion charge would be more effective and equitable than a WPL. Not least because it would affect all car journeys and not just those that ended at a parking space in the Eastern Arc.

More broadly, respondents want to know what other approaches were considered and why they were rejected.

Space filled up with new journeys?

Concerns were expressed about how reducing traffic and congestion may simply attract other journeys by car that people were not making previously because of the delay that they were subject to. Measures should be put in place to prevent new

space simply being filled up again with new vehicle journeys. The use of a congestion charge in addition to the traffic restriction points was one suggestion for how this issue can be addressed.

Potential for more displaced traffic/rat running – more traffic restrictions needed

A wide range of different respondents raised concerns that the proposals could result in traffic displacement to parts of the network that may or may not already be congested. Others were concerned that traffic restriction points could cause more rat running including through residential areas for example Donnington Bridge Road, the roads between Iffley and Cowley Roads and also in the Headington, Old Headington, Northway and Marston areas of the city. Some felt that Iffley Road and St Clements could become a new alternative route for journeys to and from the Marston and Headington areas. As such additional traffic restriction points were suggested to tackle this for example St Clements, Donnington Bridge Road, various residential streets.

Timing of traffic restriction points

A range of opinions were given on when traffic restriction points should operate. Some felt that they should be in use all the time whereas others argued that they are only needed when there is congestion i.e. morning and evening peak periods during the week. Some groups felt that if they operate only at peak times this would have less of a negative impact on necessary local trips by people who need to use the car.

Exemptions for traffic restriction points

A range of opinions were expressed on this point with many saying that very limited exemptions should be given for use of the traffic restriction points in order to ensure their effectiveness. Of these, it was widely suggested that only buses, taxis and private hire vehicles should be allowed. Some felt that there may be a case for allowing vehicles making essential deliveries and carrying out servicing and repairs etc, particularly in the case of city centre restriction points or generally for properties very close to the restriction points. In some instances, resident groups and providers of healthcare services made a case for allowing people living close to traffic restriction points to be allowed to pass through them to avoid long detours for essential journeys.

There was a general feeling that electric vehicles shouldn't be exempt from the traffic restrictions given their impact on traffic congestion.

It was highlighted that private buses/coaches taking children to schools in the city should be allowed to use the traffic restriction points as they help tackle the negative impacts of the school run.

Oxpens traffic restriction point/Access to Westgate

It was highlighted that the exact location of the traffic restriction point on Oxpens would influence how traffic approaches the Westgate car park – west of the car park

would require all traffic getting there to route via Abingdon Road. East of the entrance would require all traffic to route via Botley Road. This could put excessive pressure on either of those routes.

Introduction of non-car alternatives/timing of scheme start

Many stakeholders emphasised that measures to encourage and cater for non car alternative modes of transport must be in place on day one of the scheme being operational.

Expanded 20mph speed limit

A number of respondents were concerned that if the measures are effective in reducing traffic then a 20mph speed limit on all the city's roads would be needed to ensure attractive conditions for cyclists and pedestrians.

Wider Controlled Parking Zones (CPZs) coverage needed

It was frequently suggested that greater coverage of the WPL area by CPZs would be needed to prevent people from parking in residential areas rather than changing to non-car modes of travel. Any such wider CPZ coverage would be needed in time for the start of the WPL.

Removal of bus lanes

There was some concern expressed about the suggestion that traffic reduction could lead to removal of bus lane provision. This would only be acceptable if there was clear evidence that buses would not be affected by congestion in the future. It was considered that some busy junctions would continue to need priority for buses at least into the foreseeable future.

Improvements to the public realm

A number of organisations were keen to point out that traffic restriction points would offer opportunities in the vicinity to improve the quality of the public/civic realm.

New bus routes

Building on the proposals in the engagement material, there were a number of suggestions, some very detailed, about how bus services into and across the Eastern Arc could be improved to give better access to key destinations.

Improved cycle infrastructure

Ideas were given for how to improve cycling facilities, some general and some specific ideas. There was strong support for proper segregation of cyclists from vehicles and pedestrians. It was also said that high quality connections are needed from origins outside of the city.

Impact of school run



It was said several times that unlike a congestion charge, the WPL would have a limited impact on the congestion associated with school runs, not least because many of these trips do not end in the car being parked.

Tourist coaches

Some concern was expressed about the impact that the proposals might or might not have on coaches bringing tourists to the city centre. Practically speaking queries were raised about how coaches would turn around if they weren't allowed through traffic restriction points. Others were concerned that a WPL would not have sufficient effect on the negative impacts of tourist coaches.

Connecting Oxford

Feedback survey

This is a printable version of an online survey,
available at:

<https://www.smartsurvey.co.uk/s/60ZY3/>

Please complete the survey online if you can.

Paper survey forms can be posted or hand delivered to:

Connecting Oxford
Oxfordshire County Council
County Hall
New Road
Oxford
OX1 1ND

This is **not** a freepost address.

Welcome.

We're suggesting some bold ideas to improve connectivity,
reduce congestion and tackle pollution in and around
Oxford. **We need your views on them to help us develop the
proposals.**

Please **read the Connecting Oxford brochure** before completing
this questionnaire.

This survey asks for your personal data. To find out how we handle your data
please visit the webpage below or write to us at the address above.

<https://www.oxfordshire.gov.uk/council/about-your-council/access-data-and-information/data-subject-rights>

About you

1. I am completing this survey:

- In a personal capacity – **please go to question 6**
- As a representative of a business, employer or other organisation

About you and your organisation

We will assume your responses represent the views of your organisation.

If you are responding in a personal capacity, please go to question 6

2. Which business, employer or organisation are you representing?

3. What is your name?

4. What is your role in the organisation you are representing?

5. If you would like to receive updates about this project in future, please enter your email address:

More about you

6. What's your home postcode? We need this to understand how views might be shaped by where people live. We cannot identify you personally from your postcode, and it will be used only to analyse the responses to the survey.



7. If you would like to receive updates about this project in future, please enter your email address:

More about you

8. It would help us when analysing the feedback from the survey to know more about you. These questions are all optional, so you can skip this section if you want to.

- I'm happy to provide more information about myself
- I'd like to skip to the next part of the survey – **please go to question 18**

More about you

All information given is anonymous and any information provided is governed by the General Data Protection Regulations 2018. All information given will be treated as strictly confidential.

9. Are you:

- Male
- Female
- Prefer not to say
- Other (please specify):

10. What is your age group?

- Under 11
- 12 – 17
- 18 – 24
- 25 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- 65 – 74
- 75 – 84
- 85 plus



11. Please describe your marital status. Leave blank if you wish.

12. Please describe your ethnic group or background. Leave blank if you wish.

13. Please describe your religion. Leave blank or write none if appropriate.

14. Do you have a disability? Please say no, or say yes and briefly describe it if you wish. Or you can leave blank, or write prefer not to say.

Yes

No

Comments:

15. Are you currently pregnant or have you been pregnant in the last year?

Yes

No

Prefer not to say

16. Do you consider yourself to be...

Heterosexual or straight

Gay or lesbian

Bisexual

Prefer not to say

Other (please specify if you wish):

17. Is your gender identity the same as the gender you were assigned at birth?

- Yes
- No
- Prefer not to say

Thank you for answering these additional questions.

Your travel

These questions are about how you travel in and around Oxford.

If you are responding on behalf of an organisation, please go to question 26

18. For what purpose do you most often travel in and around Oxford?

- Commuting to and from work
- Business travel whilst at work
- Shopping, leisure or tourism
- Visiting friends and family
- Other (please specify):

19. What is the postcode of your normal place of work (if applicable)?



Your travel

20. Thinking about your main purpose for travelling in Oxford, how do you most often travel?

- Bicycle
- Bus
- Car all the way to my destination
- Motorcycle
- Park & Cycle
- Park & Ride (bus)
- Park & Walk
- Taxi
- Train & Bus
- Train & Cycle
- Train & Taxi
- Train & Walk
- Walk
- Other (please specify):

Why do you use this mode?



About your bus travel (if applicable)

21. Which bus service(s) do you most often use?

Your priorities when travelling

22. What three things are most important to you when travelling in Oxford?

Please enter the numbers 1, 2 and 3 in the boxes below.

1 = most important

2 = second most important

3 = third most important

You can only enter numbers 1 -3. Please use each number only once, otherwise we can't use your response and it won't count towards our analysis.

- | | |
|---|--------------------------|
| The reliability of my journey | <input type="checkbox"/> |
| How safe I feel whilst travelling | <input type="checkbox"/> |
| Being able to do something else (e.g. work or read) whilst travelling | <input type="checkbox"/> |
| The impact of my journey on my health | <input type="checkbox"/> |
| The impact of my journey on the environment | <input type="checkbox"/> |
| Having a comfortable journey | <input type="checkbox"/> |
| How long my journey takes | <input type="checkbox"/> |
| How much my journey costs | <input type="checkbox"/> |

Comments:

Your views on traffic restrictions

23. Based on your priorities, do you think the additional traffic restrictions we're suggesting would make your journeys better or worse overall?

- Better
- About the same
- Worse
- Don't know

Why do you say that?

Your views on a workplace parking levy

24. Based on your priorities, do you think the workplace parking levy and the improvements it could pay for would make your journeys better or worse overall?

- Better
- About the same
- Worse
- Don't know

Why do you say that?



Your ideas for other changes

25. Based on your priorities, could anything else be done to improve your journeys in Oxford?

- Yes (please state below)
- No
- Don't know

Comments:

Your organisation's priorities

If you are responding in a personal capacity, please go to question 30

26. What are your organisation's top three priorities for transport in and around Oxford?

The options relate to your organisation's staff commuting, business travel and goods/servicing requirements.

Please enter the numbers 1, 2 and 3 once in each COLUMN (A, B and C) below. Please use each number only once in each column, otherwise we can't use your response and it won't count towards any analysis.

1 = most important priority

2 = second most important priority

3 = third most important priority

	Staff commuting to and from work	Business travel (excluding commuting)	Movement of goods and service vehicles
Reliability	<input type="text"/>	<input type="text"/>	<input type="text"/>
Safety	<input type="text"/>	<input type="text"/>	<input type="text"/>
Impact on fitness and health	<input type="text"/>	<input type="text"/>	<input type="text"/>
Impact on air pollution and climate change	<input type="text"/>	<input type="text"/>	<input type="text"/>
Journey comfort	<input type="text"/>	<input type="text"/>	<input type="text"/>
Journey times	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transport costs	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments:

Your organisation's views on traffic restrictions

27. Based on its priorities, does your organisation think the additional traffic restrictions we're suggesting would make transport in Oxford better or worse overall?

- Better
- About the same
- Worse
- Don't know

Why do you say that?

Your organisation's views on a workplace parking levy

28. Based on its priorities, does your organisation think the workplace parking levy and the improvements it could pay for would make transport in and around Oxford better or worse overall?

- Better
- About the same
- Worse
- Don't know

Why do you say that?

Your organisation's ideas for other changes

29. Based on your organisation's priorities, is there anything else that could be done to improve transport in Oxford?

More detailed questions

You have reached the end of the main questions.

30. If you have time, would you like to answer a few more detailed questions? Depending on the length of your answers this may take another 10 minutes or more, but your answers will be very helpful.

- Yes, I'd like to answer some more detailed questions
- No thanks, I'd like to finish the survey – **please go to question 39**



Detailed questions - traffic restrictions

31. Should there be any exemptions for the traffic restrictions? If so, please explain why.

32. At what times and on which days should the traffic restrictions be in force? Why?

33. What other complementary schemes would you like to see for the traffic restrictions, and why?

34. Are the suggested traffic restrictions in the right places? Please describe any changes you would like to see, and why.

Detailed questions - workplace parking levy

35. We're suggesting that employers who provide 10 or fewer commuter car parking spaces would be exempt from the workplace parking levy. Do you think this is right? Should anyone else be exempt from the workplace parking levy? If so, please explain why.

36. What is your view on the proposed boundary of the Eastern Arc workplace parking levy?

37. What level of charge do you think is appropriate for the workplace parking levy? £400 - 600 per parking space per year is the suggested level.

38. What is your view on the suggested bus routes and employer/employee benefits that could be funded through the workplace parking levy? Do you think the levy should be used to fund any other transport improvements?



Any other comments

39. If you'd like to make any other comments before you finish, please do so here. We can't respond to individual questions raised here. If you have a question you'd like us to reply to, please write to us at the address above.

Thank you for completing this survey.

Service and Community Impact Assessment (SCIA)

Front Sheet:

Directorate and Service Area:

Communities – Planning & Place

What is being assessed (e.g. name of policy, procedure, project, service or proposed service change):

Connecting Oxford

Responsible owner / senior officer:

Sue Halliwell, Director for Planning & Place

Date of assessment:

November 2019

Summary of judgement:

There are risks of negative impacts relevant to the following characteristics/areas:

- Age
- Disability
- Pregnancy and maternity
- Sex
- Rural communities
- Areas of deprivation
- Other council services
- Other providers of council services

The assessment recommends:

- Further assessment of these risks
- Further consultation with the communities and individuals identified
- Consideration of changes to the proposals to mitigate the risks identified

Detail of Assessment:

Purpose of assessment:

Briefly summarise why you have done the assessment (e.g. in response to new or proposed changes to a policy, project, contract or service delivery).

This assessment is being carried out in response to a new project, Connecting Oxford.

Ideas put forward in the Connecting Oxford plan are based on the policies and strategy in the county council's Local Transport Plan, and more specifically, the Oxford Transport Strategy.

The proposals are still at a relatively early stage, with no decisions having been made yet about the scheme. An informal public engagement exercise was carried out in September and October 2019. Over 3000 responses were received. The purpose of this SCIA is to:

Provide a high level summary of the known issues at this stage, to inform a Cabinet decision in January 2020; and

Inform the next stage of work on the project, if approved by Cabinet.

You should also include the following statement to clearly set out the reasons and context for undertaking the assessment:

Section 149 of the Equalities Act 2010 ("the 2010 Act") imposes a duty on the Council to give due regard to three needs in exercising its functions. This proposal is such a function. The three needs are:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic, and those who do not.

Complying with section 149 may involve treating some people more favourably than others, but only to the extent that that does not amount to conduct which is otherwise unlawful under the new Act.

The need to advance equality of opportunity involves having due regard to the need to:

- remove or minimise disadvantages which are connected to a relevant protected characteristic and which are suffered by persons who share that characteristic,
- take steps to meet the needs of persons who share a relevant protected characteristic and which are different from the needs other people, and

- encourage those who share a relevant characteristic to take part in public life or in any other activity in which participation by such people is disproportionately low.
- take steps to meet the needs of disabled people which are different from the needs of people who are not disabled and include steps to take account of a person's disabilities.

The need to foster good relations between different groups involves having due regard to the need to tackle prejudice and promote understanding.

These protected characteristics are:

- age
- disability
- gender reassignment
- pregnancy and maternity
- race – this includes ethnic or national origins, colour or nationality
- religion or belief – this includes lack of belief
- sex
- sexual orientation
- marriage and civil partnership

Social Value

Under the Public Services (Social Value Act) 2012 the Council also has an obligation to consider how the procurement of services contracts with a life value of more than £173,934¹¹ might improve the economic, social, and environmental well-being of the area affected by the proposed contract, and how it might act to secure this improvement. However, it is best practice to consider social value for all types of contracts, service delivery decisions and new/updated policies. In this context, 'policy' is a general term that could include a strategy, project or contract.

Context / Background:

Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.

Connecting Oxford is a project to develop and implement transport congestion management schemes in and around Oxford. The project is being promoted jointly by Oxfordshire County Council and Oxford City Council.

Connecting Oxford is part the Oxford Transport Strategy, which is in turn part of the county council's fourth Local Transport Plan. The principles are supported by Oxford City Council's new Local Plan. The plans are also part of the two council's efforts to address the causes of climate change.

Oxfordshire needs a modern, efficient, reliable, affordable and sustainable transport system. This means transforming transport connectivity and how people move

¹¹ [EC Procurement Threshold for Services](#)

around, while ensuring everyone has access to employment, education, health, retail, and leisure.

Vitally, it also means moving Oxfordshire's transport system to one that is largely zero emission, and as close to zero-carbon as possible, within 20 years. This will improve people's health and wellbeing and reduce transport's contribution to climate change.

To make this vision a reality, Oxfordshire's transport system needs to encourage more walking, cycling and use of public transport, and reduce the number of motor vehicles on the roads, particularly in and around Oxford. Connecting Oxford will play a major part in delivering this vision.

Proposals:

Explain the detail of the proposals, including why this has been decided as the best course of action.

The Connecting Oxford proposals consist of five new traffic restrictions (two in the city's Eastern Arc and three in the city centre); a workplace parking levy in the Eastern Arc; new and improved bus services in the Eastern Arc; and walking and cycle route improvements across the city. The core elements of the proposal are the traffic restrictions and workplace parking levy, and these were the focus of the public engagement in September/October 2019.

The rationale for the proposals is set out in the documentation published online. The rationale for the Oxford Transport Strategy (OTS - of which Connecting Oxford forms part) are set out in the OTS, also published online.

Evidence / Intelligence:

Explain any data, consultation outcomes, research findings, feedback from service users etc that supports your proposals and can help to inform the judgements you make about potential impact of different individuals, communities or groups.

The evidence base for the OTS is summarised within the OTS itself; likewise, the Connecting Oxford public engagement document includes the key evidence base for the Connecting Oxford proposals specifically. The evidence base that supports the proposals currently includes high level traffic modelling completed for the OTS, routine traffic and air quality monitoring, workplace parking surveys, research from other cities in the UK and elsewhere, and feedback from the recent public engagement.

This SCIA is informed by feedback from the recent public engagement, as well as by UK and international research on transport demand management and air pollution, and independent professional advice on the implications of traffic restrictions for people with disabilities.

Alternatives considered / rejected:

Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.

Alternatives to the overall strategy set out in the OTS were considered as part of the OTS and are covered within the OTS document, published online.

Alternatives to the Connecting Oxford proposals are covered within the information about Connecting Oxford published online.

In summary, doing nothing is not an option because the problems of poor transport connectivity (caused mainly by traffic congestion), local air pollution, and climate change would remain and worsen if nothing is done.

Alternatives such as building more roads are not appropriate, as these would offer only temporary connectivity improvements and would not address local air pollution and climate change issues.

Opportunities to improve sustainable transport infrastructure (including bus, cycling and walking routes, and railways) are limited by the space available in a constrained city like Oxford, and by the availability of funds. The construction of large infrastructure projects of any kind also consumes resources and contributes to climate change.

The preferred strategy is therefore to make the best possible use of existing transport infrastructure by reducing the number of private cars on the roads, thereby allowing space to be reallocated to sustainable modes of transport, which can offer improved connectivity whilst reducing local air pollution and tackling climate change.

The councils believe the Connecting Oxford proposals are the fairest, most effective way of reducing traffic. Alternatives such as a congestion charge have been considered but are not being progressed at this stage because a congestion charge would not achieve – and sustain – the same level of traffic reduction as traffic restrictions, particularly if it applied only to the city centre.

A congestion charge covering the whole city would require a large number of enforcement cameras and involve hundreds of thousands of daily transactions; this would make it expensive to operate, with less funding available for transport improvements.

Impact Assessment:

Identify any potential impacts of the policy or proposed service change on the population as a whole, or on particular groups. It might be helpful to think about the largest impacts or the key parts of the policy or proposed service change first, identifying any risks and actions, before thinking in more detail about particular groups, staff, other Council services, providers etc.

It is worth remembering that 'impact' can mean many things, and can be positive as well as negative. It could for example relate to access to services, the health and wellbeing of individuals or communities, the sustainability of supplier business models, or the training needs of staff.

We assess the impact of decisions on any relevant community, but with particular emphasis on:

- Groups that share the nine protected characteristics
 - age
 - disability
 - gender reassignment
 - pregnancy and maternity
 - race – this includes ethnic or national origins, colour or nationality
 - religion or belief – this includes lack of belief
 - sex
 - sexual orientation
 - marriage and civil partnership
- Rural communities
- Areas of deprivation

We also assess the impact on:

- Staff
- Other council services
- Other providers of council services
- Any other element which is relevant to the policy or proposed service change
- How it might improve the economic, social, and environmental of the area affected by the contract **if** the Public Services (Social Value) Act 2012 applies

For every community or group that you identify a potential impact you should discuss this in detail, using evidence (from data, consultation etc.) where possible to support your judgements. You should then highlight specific risks and any mitigating actions you will take to either lessen the impact, or to address any gaps in understanding you have identified.

If you have not identified an impact on particular groups, staff, other Council services, providers etc. you should indicate this to demonstrate you have considered it.

Impact on Individuals and Communities:

Community / Group being assessed (as per list above – e.g. age, rural communities – do an assessment for each one on the list)

Summarise the specific requirements and/or potential impact on this community / group, and then highlight the most significant risks and mitigating action that has been or will be taken.

Age

Risks	Mitigations
<p>Older people (excluding impacts related to disability, which are considered separately)</p> <p>Survey data: Over 65 years olds were slightly more likely than the average respondent to say traffic restrictions would make their journeys worse, but slightly less likely than average to say the WPL would make their journey worse.</p> <p>Some older people may be more reliant on their car, even if they have no disability, so they may be negatively affected by the proposals, particularly the traffic restrictions because they may increase the duration and length of car trips. This may in turn exacerbate loneliness or isolation for those affected.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact on older people</p> <p>Continue to engage groups representing older people in subsequent consultations</p>
<p>Young people</p> <p>Survey data: insufficient responses to draw any conclusions</p> <p>School age children may be negatively affected if the traffic restrictions make it harder for parents to drop off their children at school.</p> <p>Young people at work may be disproportionately affected by the WPL because their salaries are likely to be lower.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact on school age children</p> <p>Continue to engage with schools and groups representing young people</p>

Disability

Risks	Mitigations
<p>Survey data: people with a disability were significantly more likely than the average respondent to say that the traffic restrictions would make their journeys worse, and slightly more likely to say the WPL would make their journeys worse. The survey did not ask whether a person's disability made them more reliant on a car.</p> <p>People with a disability that makes them more reliant on travel by private car (either as a driver or passenger) may be negatively affected by the traffic restrictions and/or WPL because the cost, duration and length of car journeys may increase.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact on people with disabilities</p> <p>Consider exemptions and discounts for blue badge holders</p> <p>Continue to engage with groups representing people with disabilities</p>

Gender reassignment

Risks	Mitigations
<p>No specific risks identified</p> <p>Survey data: insufficient responses to draw any conclusions</p>	<p>Not applicable</p>

Pregnancy and maternity/paternity

Risks	Mitigations
<p>Pregnant women, who during their pregnancy have a temporary disability which falls into one of the two categories identified in the "Disability" section above</p> <p>Risks as identified above</p>	<p>See above</p>

<p>Parents with very young children, using pushchairs etc, who are more reliant on travel by car</p> <p>People in this group may be negatively affected by the traffic restrictions and/or WPL because the cost, duration and length of car journeys may increase.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact</p> <p>Employers do not have to pass on the WPL charge to staff, and may offer discounts or exemptions for parents with children if they do pass on the charge.</p>
<p>Parents with children who are more reliant on travel by car because they drop/collect their children at school or childcare using their car</p> <p>People in this group may be negatively affected by the traffic restrictions and/or WPL because the cost, duration and length of car journeys may increase.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Continue to engage with schools and school transport providers</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact</p> <p>Employers do not have to pass on the WPL charge to staff, and may offer discounts or exemptions for parents with children if they do pass on the charge.</p>

Race – this includes ethnic or national origins, colour or nationality

Risks	Mitigations
<p>Survey data: BAME or mixed race respondents were as likely as the average respondent to say the traffic restrictions and WPL would make their journeys worse.</p> <p>No specific risks identified</p>	<p>See above</p>

Religion or belief – this includes lack of belief

Risks	Mitigations
<p>Survey data: insufficient responses to draw any conclusions</p> <p>No specific risks identified</p>	<p>See above</p>

Sex

Risks	Mitigations
<p>Survey data: female respondents were significantly more likely than male respondents to say the traffic restrictions and WPL would make their journeys worse.</p> <p>On average, women are less likely to cycle than men, and are more likely to transport young children to school, childcare or other destinations. Women may also have greater personal security concerns about using public transport.</p> <p>The traffic restrictions and WPL may therefore negatively affect women to a greater extent than men.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact</p> <p>Employers do not have to pass on the WPL charge to staff, and may offer discounts or exemptions for parents with children if they do pass on the charge</p>

Sexual orientation

Risks	Mitigations
<p>Survey data: lesbian, gay or bisexual respondents were significantly less likely than average respondents to say that the traffic restrictions and WPL would make their journeys worse.</p> <p>No specific risks identified</p>	<p>Not applicable</p>

Marriage and civil partnership

Risks	Mitigations
<p>Survey data: married or civil partnered respondents were slightly less likely than average respondents to say that the traffic restrictions and WPL would make their journeys worse.</p> <p>No specific risks identified</p>	<p>Not applicable</p>

Rural communities

Risks	Mitigations
<p>Survey data: respondents from outside the OX1 to OX4 postcode areas were significantly more likely than average respondents to say that the traffic restrictions and WPL would make their journeys worse.</p> <p>People living outside Oxford are much more likely to be reliant on car travel to access destinations in Oxford.</p> <p>People living in rural communities may be negatively affected by the proposals, because they are likely to have less access to alternative modes to the car.</p>	<p>Assess further through detailed modelling and social impact assessments</p> <p>Consider role of Park & Ride</p> <p>Consider limiting hours of operation of traffic restrictions to minimise impact</p> <p>Employers do not have to pass on the WPL charge to staff, and may offer discounts or exemptions for people who live in places with poor access by non-car modes</p>

Areas of deprivation

Risks	Mitigations
<p>Survey data: not available</p> <p>WPL may negatively affect people on lower incomes.</p> <p>The proposals may harm the local economy, which would particularly affect people in more deprived areas.</p>	<p>Assess further through detailed modelling and economic/social impact assessments</p> <p>Employers do not have to pass on the WPL charge to staff; even if they do, they may choose to base the amount charged to each member of staff on their salary (e.g. a % of salary rather than a fixed amount)</p>

Impact on Staff

Summarise the specific requirements and/or potential impact on staff, and then highlight the most significant risks and mitigating action that has been or will be taken.

No additional risks identified for staff that are not covered by the “Individuals and Communities” section above. The county council has several offices and other premises in Oxford, but these are generally in locations accessible by non-car modes, and do not have a large amount of car parking for staff.

The county council will need to decide if and how it passes the WPL on to staff.

Impact on other Council services

Summarise the specific requirements and/or potential impact on other council services, and then highlight the most significant risks and mitigating action that has been or will be taken.

There is a risk of negative impacts on:

- Recruitment & retention of skilled staff (particularly teachers/teaching assistants, social workers)
- Operational travel (for example, by social workers making home visits)

These risks need to be further assessed through detailed modelling and economic/social impact assessments, and need to be discussed with the service areas affected.

Impact on providers:

Summarise the specific requirements and/or potential impact on providers of council services, and then highlight the most significant risks and mitigating action that has been or will be taken.

There is a risk of negative impacts on providers’ transport and travel requirements (for example, contracted staff making home or site visits, deliveries to council premises).

These risks need to be further assessed through detailed modelling and economic/social impact assessments, and need to be discussed with any service areas affected.

Social Value

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

How might the proposal improve the economic well-being of the relevant area?

Not applicable

How might the proposal improve the environmental well-being of the relevant area?

Not applicable

Action plan

Summarise the actions that will be taken as a result of the assessment, including when they will be completed and who will be responsible. It is important that the officer leading on the assessment follows up to make sure the actions are completed, and updates the assessment as appropriate. Any significant risks identified should also be added to the appropriate service or directorate risk register, to ensure they are appropriately managed and reviewed.

Action	By When	Person responsible
Detailed modelling and economic/social impact assessments	Summer 2021	Joanne Fellows
Further discussion with communities/individuals at risk of negative impact and groups representing them	Summer 2021	Joanne Fellows
Formal consultation to include all communities/individuals at risk of negative impact, and groups representing them	Summer 2021	Joanne Fellows
Consideration of changes to the proposals, including discounts and exemptions, to address residual risks identified after two actions above have been completed	Summer 2021	Joanne Fellows

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Connecting Oxford - programme up to & including submission of business case & WPL scheme Order

	2019/20		2020/21				2021/22			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Tasks										
Engagement & consultation										
Business & stakeholder engagement										
Consultation										
Public Inquiry										

Division(s): N/A

CABINET – 21 JANUARY 2020

FORWARD PLAN AND FUTURE BUSINESS

Items identified from the Forward Plan for Forthcoming Decision

Topic/Decision	Portfolio/Ref
Cabinet, 25 February 2020	
<ul style="list-style-type: none"> ▪ Business Management & Monitoring Report - December 2019 To note and seek agreement of the report. <p>Joint Responsibility: Deputy Leader of the Council and Cabinet Member for Finance.</p>	Cabinet, Deputy Leader of the Council 2019/149
<ul style="list-style-type: none"> ▪ Staffing Report - Quarter 3 - October-December 2019 Quarterly staffing report providing details of key people numbers and analysis of main changes since the previous report. 	Cabinet, Deputy Leader of the Council 2019/198
<ul style="list-style-type: none"> ▪ Director of Public Health Annual Report An Annual report is a statutory duty of Director of Public Health and it is a duty of the County Council to publish the report. The Director of Public Health for Oxfordshire will present his annual report for 2018/19. 	Cabinet, Adult Social Care & Public Health 2019/161
<ul style="list-style-type: none"> ▪ Becoming a Dementia Friendly Council To seek agreement for the Council to pursue becoming Dementia Friendly. 	Cabinet, Adult Social Care & Public Health 2019/162
<ul style="list-style-type: none"> ▪ Digital Infrastructure Strategy & Partnership Memorandum of Understanding To seek endorsement by Cabinet for Digital Infrastructure Strategy and formation of a Digital Infrastructure partnership between County, City and district Councils by way of a Memorandum of Understanding. 	Cabinet, Finance 2020/001
<ul style="list-style-type: none"> ▪ Youth Opportunity Fund To seek approval of the recommendations for funding. 	Cabinet, Local Communities 2019/192

Cabinet Member for Education & Cultural Services, 12 February 2020

- **Early Years Funding Formula 2020-21**
 To seek approval of the County Council's Early Years funding formula for 2020/21.
 Cabinet Member
for Education &
Cultural Services,
2019/163

Cabinet Member for Environment, 13 February 2020

- **Didcot: Cow Lane and B4493 Foxhall Road - Proposed Waiting Restrictions**
 To seek approval of the proposals.
 Cabinet Member
for Environment,
2019/194
- **Eynsham: Wharf Road - Proposed Waiting Restrictions**
 To seek approval of the proposals.
 Cabinet Member
for Environment,
2019/126
- **Brightwell cum Sotwell: A4130 - Proposed 40mph Speed Limit**
 To seek approval of the proposals.
 Cabinet Member
for Environment,
2019/178
- **Brize Norton: Carterton Road and Station Road - Proposed Traffic Calming Measures**
 To seek approval of the proposed traffic calming measures on Carterton Road and Station Road, Brize Norton.
 Cabinet Member
for Environment,
2019/086
- **Oxford: Headley Way and Cherwell Drive - Proposed Side Road Junction Treatments and Shared Use Footway/Cycletracks**
 A decision is sought on a proposed additional side road junction treatments and shared used footway/cycletracks as part of the Access to Headington project.
 Cabinet Member
for Environment,
2019/208